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SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION

MARKET STUDY

MAIN REPORT

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Prepared & Submitted

to **SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION**

by **INTERNATIONAL FORESTSEARCH (CANADA) LTD.**

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FOREWORD

This Final Report, requested by the SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION, represents the current and projected Christmas Tree market conditions in Saskatchewan.

The findings of the Study, owing to their extent, are presented in two (2) separate reports:

MAIN REPORT : The Market Potential, Promotional & Marketing Recommendations including an Introduction to the Study and its objectives.

APPENDICES REPORT : The Study Support Data, including

- Project Methodology
- Analysis of Consumer, Institutional & Commercial, and Retailer Responses
- Export/Import Analysis
- General Study Support Statistics

Therefore, these two (2) reports form an inseparable unit to the reader.

ABSTRACT

A comprehensive 1988 Saskatchewan Christmas Tree Market Study is presented in this Report, based on households, institutional & commercial establishments, and Christmas tree retailer responses to telephone & mail surveys, conducted before, during & after the 1988 Christmas Holiday Season. (See Figure 1, following page, for Geographical Coverage of Saskatchewan).

Results indicate an actual, existing, natural tree market potential of 118,820 trees and a total market potential of 433,476 trees, within the Province of Saskatchewan. Promotional & Marketing recommendations are provided to guide the SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION on the way to realizing the actual market potential by the year 1995, considering present & forecasted future economic & consumer attitude conditions.

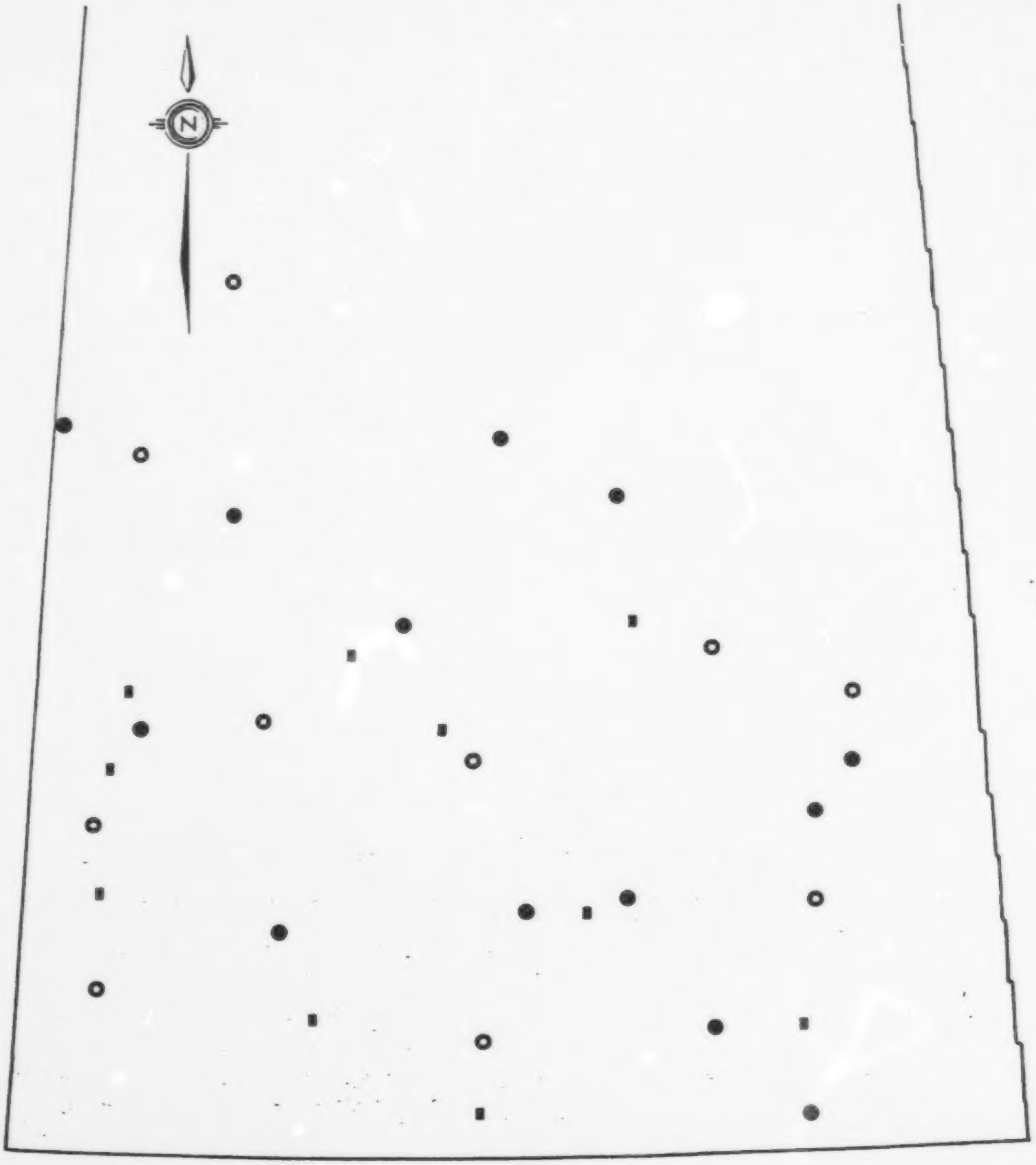

Figure 1. **Surveyed Saskatchewan Community Distribution**

LEGEND

- ● : CITIES (>5,000 population)
- ○ : TOWNS (1,000 - 5,000 population)
- ■ : VILLAGES (<1,000 population)

Source: SASKATCHEWAN HEALTH COVERED POPULATION, JUNE 1988

0. EXECUTIVE SUMMARY

0.1 The SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION (SCTGA), established in 1987, has already undertaken several key steps on the path to becoming a major Christmas tree market & marketing force in Saskatchewan in the 1990's and beyond. Included within their efforts has been a 1987 Christmas Tree Market Study, undertaken internally, that has provided a preliminary indication of market size, but tied only to Saskatchewan's ten (10) largest population centres.

0.2 In late 1988 and early 1989, the desire for a more comprehensive & detailed **market study**, was met with the full cooperation of the SCTGA membership, under the following **main objectives:**

(a) **To present detailed & accurate 1988 Christmas tree market data for future production commitment planning.**

(b) **To identify key market chain elements & derivative product markets.**

(c) **To provide long-term market trends & sales projections.**

(d) **To suggest promotional & marketing strategies.**

0.3 (a) A **Saskatchewan Household Profile** was developed, based on results of a consumer telephone survey:

Natural Tree Purchaser: Resides in a house or mobile home; earns a total family income greater than $30,000; resides in a town or village; children are present in the family; purchaser age of 35-55 years.

Artificial Tree Purchaser: Resides in an apartment or house; earns a total family income less than $30,000; resides in a city; children are present in the family; purchaser age of less than 35 or greater than 55 years.

Natural/Artificial Tree Purchaser: Resides in a house; earns a total family income greater than $20,000; resides in a city; children are present in the family; purchaser age of 25-45 years.

No-Tree Household: Resides in an apartment; earns a total family income of less than $20,000; resides in a city; purchaser is usually single (unattached); purchaser age of 18-25 or greater than 55 years.

(b) In 1988, 80% of Saskatchewan households displayed a Christmas tree during the Christmas Holiday Season. From this percentage:

- 46% of households displayed natural trees only;
- 52% of households displayed artificial trees only; and
- 2% of households displayed both a natural & artificial tree.

0.4 An **Actual Market Potential of 118,820 natural Christmas trees** existed in 1988, and should continue to exist into the year 1995, despite Saskatchewan's forecasted weak future economic condition. This number is representative of the minimum number of households and institutional & commercial establishments purchasing a natural tree in the future.

A **Total Market Potential of 433,476 natural Christmas trees** does exist, if every Saskatchewan household and each institutional & commercial establishment purchases a natural tree.

0.5 The **United States** is the **only exporter of natural trees into Canada**. Natural tree imports into Canada had remained relatively stable to 1986, followed by a 270% jump, in 1987, to over $2,500,000 worth of trees. Many factors are attributable to this increase, including a lifting of the 30% tariff, an American oversupply of natural trees and a strong American dollar (relative to the Canadian dollar). This trend of increasing American natural tree imports is expected to continue at a more moderate pace into 1995.

0.6 **Artificial Christmas tree imports** have risen 428% since 1976, to over $3,000,000 in 1987. This rise is attributable to increased volumes of high quality trees from Taiwan, China & Hong Kong at reasonable prices.

0.7 **Canadian natural tree exports** have risen slowly since 1976, to approximately 2,800,000 trees in 1987. The most evident, existing trend is a general shift away from overseas markets to a situation, in 1987, of the United States receiving 96% of these Canadian trees.

0.8 **Natural tree safety concerns** and the **convenience of owning an artificial tree**, are the most important factors presently influencing the number of natural Christmas trees sold in Saskatchewan.

Environmental concerns about harvesting young trees for a short Christmas Holiday period, although not seriously affecting the market at this time, may result in a decrease in natural tree sales over the next few years, depending on how educational & promotional campaigns are developed & introduced to the marketplace.

0.9 There is no one recommendation that, if implemented separately by the SCTGA, will ensure that the Actual Market Potential is attainable by 1995. However, a combination of the suggestions, listed below, will result in a successful attempt to penetrate, capture and expand upon this potential.

(a) Retailer Awareness

- continuous contact with large community clubs, organizations, regional retail chain stores, and with the retailers contacted during the 1987 & 1988-89 Market Studies.
- development of a live-tree catalogue.
- consistent supply of excellent quality trees, beginning in 1995.

(b) General Public Awareness

- advertise a 'Saskatchewan Product'.
- develop information sheets regarding Christmas tree facts, safety, and general tree care, to be distributed to consumers through existing retailers.

(c) Christmas Tree Safety Awareness

Obtain the most up-to-date library on natural Christmas tree safety information, to supply municipal fire marshals, media sources, and indirectly, the general public, with an accurate information base.

1. INTRODUCTION

The SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION (SCTGA), established in 1987, developed a preliminary information base for its members in the form of a Christmas Tree Market Study (1987), to provide its members with an initial indication of the Saskatchewan market size, but tied only to the Province's ten (10) largest population centres.

In April 1988, the SCTGA, in close cooperation with INTERNATIONAL FORESTSEARCH (CANADA) LTD. (IFSC), developed an extremely detailed Stock Acquisition Study, fully funded by the CANADIAN FORESTRY SERVICE (Prince Albert Offices).

In response to the desire for a more comprehensive and detailed market study, IFSC submitted a Market Conceptualization for discussion amongst SCTGA members, on August 19th, 1988. The SCTGA, in close cooperation with IFSC & FORESTRY CANADA (Canadian Forestry Service) (Prince Albert), submitted a formal proposal for project funding to various government agencies.

The SASKATCHEWAN DEPARTMENT OF AGRICULTURE accepted & approved the submitted proposal for funding, in the amount of $ 25,000.00, through the AGRICULTURE DEVELOPMENT FUND, on November 19th, 1988. This was followed by a topping-up of funds by FORESTRY CANADA, in the amount of $3.750.00, resulting in immediate project initiation.

(d) Continuous Market Analysis

- Monitor all key market chain elements annually for changing consumer & retailer attitudes about Christmas tree types & species preferences.
- New or no longer existing market chain elements.
- Public awareness facts.

(e) Maintenance of Records

Keep up-to-date, accurate records on existing plantation growing stock, by species & quantity.

(f) Consumer Profiling & Flexibility

- Diversify tree heights (particularly smaller trees) to capture the > 55 years age group.
- Provide tree bags and promote the freshness & quality of a Saskatchewan-grown tree, to sway the < 35 year age group.
- Promote a cheaper, yet rugged tree, to lure the households earning incomes of < $30,000.

(g) Choose & Cut Operations

Provide plantations which are accessible to the general public, where the consumer can choose the 'right' tree. Advantages of this type of operation include: family participation, the 'outdoor' feeling, and ensuring a fresh tree to a safety-conscious consumer.

(h) Tree Grading Systems

Develop & implement an easy-to-understand (i.e. colour coded) grading system, to benefit the consumer, retailer, and ultimately, the SCTGA.

(i) The Christmas Tree Derivative Market

Offer a relatively inexpensive (< $15.00) natural Christmas tree wreath, to capture the artificial wreath market.

0.10 The 1988-1995 time period should be a time for action by the SCTGA membership. Although six (6) years away from a marketable product, the SCTGA must be fully prepared for stiff competition from out-of-Province supplies who, at present, have a secure market, but will not have a **Saskatchewan-grown product**.

2. OBJECTIVES

The main objectives of this Market Study are to:

1. Present detailed & accurate 1988 Christmas tree market data for future production commitment planning.
2. Identify key market chain elements & derivative product markets.
3. Provide long-term market trends & sales projections.
4. Suggest promotional & marketing strategies.

3. THE MARKET POTENTIAL

3.1 CURRENT SITUATION

The collection of data & information for this Study, by means of telephone interviews, mail surveys, on-site discussions, agency provisions and the assistance of a large number of interested individuals, has resulted in a substantial volume of Christmas tree facts & figures. Many of these results are displayed graphically in the accompanying Appendices Report.

For the current (1988) situation in Saskatchewan, a relatively accurate profile of the typical consumer can be produced. As expected, Table 1 (below) depicts the average Saskatchewan family from a small town or village setting as the main consumer of natural trees. The Appendices data reveals the buyer of natural trees as 30 - 50 years of age, married, with children, and gross income greater than $35,000 per annum. This Table also shows the typical profile of the artificial tree buyer, the artificial & natural tree buyer, and the individuals who do not purchase either types of trees. These results are meant to be generalizations, as there will always be consumers that do not fall into any of these tree purchaser categories.

Table 1. SASKATCHEWAN HOUSEHOLD PROFILE

	NATURAL TREE PURCHASER	ARTIFICIAL TREE PURCHASER	NATURAL/ARTIFICIAL TREE PURCHASER	NO-TREE HOUSEHOLD
PLACE OF RESIDENCE	House Mobile Home	Apartment House	House	Apartment
INCOME	> $30,000	< $30,000	> $20,000	< $20,000
LOCATION	Town Village	City	City	City
FAMILY MEMBERSHIP	Family with Children	Single; Family with Children	Family with Children	Single
AGE OF USER	35-55 Years	< 35 Years > 55 Years	25-45 Years	18-25 Years > 55 Years

There is no reason to believe why this typical consumer household should ever noticeably change. The age may vary slightly, the income will probably increase accordingly each year, and the number of children may vary a percentage point, but as long as there is the Christmas tradition and hence a demand for Christmas trees, this type of family will remain as the primary consumer.

Institutional & commercial establishments account for the alternate Christmas tree market. As indicated in Appendix IV, the vast majority of this market utilizes artificial trees, although they may actually prefer naturals. The main reason for this trend is one of safety concern. With current fire restrictions and public awareness, it is unlikely that the preference will switch back to natural trees. As indicated in the market flow chart for these establishments (Figure 1), there is a natural tree market, but not a significant one.

There are many factors influencing the typical Christmas tree consumers' decisions to purchase a natural or artificial tree. It is common knowledge that growth & prosperity in the Province have declined over the past few years. Listed & explained, on the following pages, are seven (7) factors which currently have a direct impact on the natural Christmas tree market potential.

3.1.1 The Economy

Saskatchewan relies almost exclusively on agriculture as a means of revenue generation. Although small industries, mining & forestry will continue to grow, it is unlikely they will ever replace farming. The recent droughts, increased operating costs, reduced exports, and declining crop prices have left the overall economy of Saskatchewan in a descending deficit situation. Directly, this reduction has lowered consumer spending power, particularly on non-necessity items such as Christmas traditions. Indirectly, the economy affects to some extent the remaining factors.

3.1.2 The Population

In December 1988, Statistics Canada estimated the overall population of Saskatchewan had declined by 1,200 people. Due to the poor economy, individuals & families are moving to other provinces with diverse and alternative employment opportunities. Within the Province, a population movement has been noted of individuals leaving towns & out-lying areas and moving to the major centres, such as Regina & Saskatoon. A portion of the younger population is also exiting the province to find viable employment or advanced education elsewhere.

3.1.3 Housing Starts

An obvious result of population decline is a corresponding decline in the number of new homes being built. Canada Mortgage & Housing Corporation (CMHC) estimates reveal that in 1986, approximately 5,500 units were built. They predict that only 3,300 units will be developed in 1989. A further indication of decline is a CMHC survey, conducted several times a year, showing increasing occupancy rates in rental housing throughout Saskatchewan. This can, ultimately, lead to minimal rental construction projects, due to low rental rates.

3.1.4 Natural & Artificial Tree Imports

The analysis of imports of Christmas trees into Canada (see Appendix 5) indicates an increase in imports for both natural & artificial trees.

3.1.41 Natural Trees

The United States continues to be the sole supplier of natural trees. In 1987, the U.S. exported approximately 250,000 trees to Canada, up substantially from approximately 90,000 in 1986. Statistics Canada (1986 Census) data indicates Canada's population residing in private households at approximately 25,000,000, with an average of 2.8 people per household. This data results in a potential Canadian household market of 10,000,000 trees (excluding institutional & commercial establishments).

Therefore, the United States, in 1987, supplied at least 2.5% of Canada's total potential market with natural trees alone. At present, no tariff exists on U.S. natural Christmas trees entering Canada.

3.1.42 Artificial Trees

During the past three (3) years, the Pacific Rim countries have introduced excellent quality artificial trees, at a reasonable cost, to Canadians. Taiwan & Hong Kong have been (since 1976) a major supplier of trees, whereas, recently (1987), China has captured 29% of Canadian imports.

Import values of artificial trees for 1987 have risen 428%, from $700,000 in 1976 to over $3,000,000 in 1987.

3.1.5 Natural Tree Exports

Appendix 5 (of the Appendices Report to this Study) provides an analysis of Canadian exports of natural trees. The exporting market has remained relatively stable, increasing gradually from approximately 2,000,000 trees in 1976 to 2,800,000 in 1987.

The most evident trend in this market is the shift away from overseas markets, to present a condition of 96% of Canadian natural tree exports going directly to the United States.

3.1.6 Safety Awareness

The results of the survey questionnaire to institutions & commercial establishments indicated that they prefer the artificial tree over the natural tree. Establishments that have displayed natural Christmas trees in past years are changing to artificial trees, due mainly to fire regulation restrictions and also longevity & convenience.

There is a growing trend in Saskatchewan restricting the use of natural trees to only private dwellings, based on the recommendations of local Fire Marshals. Although this trend was most noticeable in the institutional & commercial survey analysis, private householders also commonly commented on their concerns about natural tree safety.

3.1.7 The Environment

The current controversy over the world's environment crisis, whether it be the ozone layer, pollution or the destruction of rain forests, has resulted in "the middle-aged opinionated environmentalist".

Consumers appeared to be evenly split on the pros or cons of Christmas tree production, when they offered comments. Typical comments included "the cutting of trees is bad" and "growing extra trees adds oxygen to the atmosphere."

Environmental issues are a growing concern amongst the general public, that seems to yearn for statistics on the destruction of the world's forest resource base. There is room for the SCTGA to educate the public on the benefits of Christmas tree growing to the environment, providing basic facts & figures in a public awareness campaign.

3.2 PROJECTED SITUATION

The trends, facts and figures on the 1988 natural Christmas tree market potential are based on actual survey data (see Appendices Report) and statistical background information from Saskatchewan Health Statistics, Statistics Canada and Canada Mortgage & Housing Corporation. To predict these same parameters to 1995 and beyond requires knowledgeable speculation & assumptions based on trends extrapolated from the aforementioned facts.

3.2.1 Market Potential Flow Chart

Figure 1 (page 3-8), a flow chart, indicates the actual market potential of natural Christmas trees in Saskatchewan as it exists in 1988.

The total number of Saskatchewan households displaying natural trees in 1988, the number of artificial tree households indicating that they would switch to a natural tree, and the number of no-tree households planning on displaying a natural tree in the future, is approximately 241,966.

From this figure, the indicated percentages describe the number of householders who are interested in displaying Saskatchewan-grown trees, the number of households who are truly loyal to the natural tree, and the number of households who purchase (not cut) their own tree, respectively.

The institutional & commercial establishments' side of the flow chart operates similarly in most respects. The total number of establishments displaying natural trees, the number of artificial tree establishments willing to display a Saskatchewan-grown Christmas tree, and the number of no-tree establishments who plan on displaying a natural tree in the future, is approximately 21,190.

The establishments willing to use Saskatchewan as a sole source, that are truly loyal to the natural tree and the ones who purchase (not cut) their own tree, are presented accordingly.

Thus, the actual market potential for natural Christmas trees in 118,820 trees, which translates to the minimum number of trees the SCTGA should plan on growing for retail in 1995, based on 1988 survey data & government statistics.

The maximum number of natural trees, or Total Market Potential, is 433,476 trees (total number of Saskatchewan households, plus the total number of institutional & commercial establishments).

Realistically, this Total Market Potential can never be realized because there will always be the artificial & no-tree user groups. However, the Actual Market Potential is one that the SCTGA can plan on attaining, utilizing the promotion & marketing recommendations found later on in this Report.

The year 1995 will be used as a projection point, as this is when the SCTGA expects to provide a marketable product. Although the target is a short six (6) years away, many of the current factors affecting the market potential will play a key role in 1995. Some of the factors will increase the potential, some will decrease the potential, and others will have little influence.

As mentioned previously, the typical consumer will remain the same for year 1995. Six (6) years will have little effect on the Province's population distribution by age class, sex or annual income.

By all indications, the general economic growth of Saskatchewan will maintain the status quo. The impact factors of the current situation are again listed, with the implications projected to 1995 and beyond.

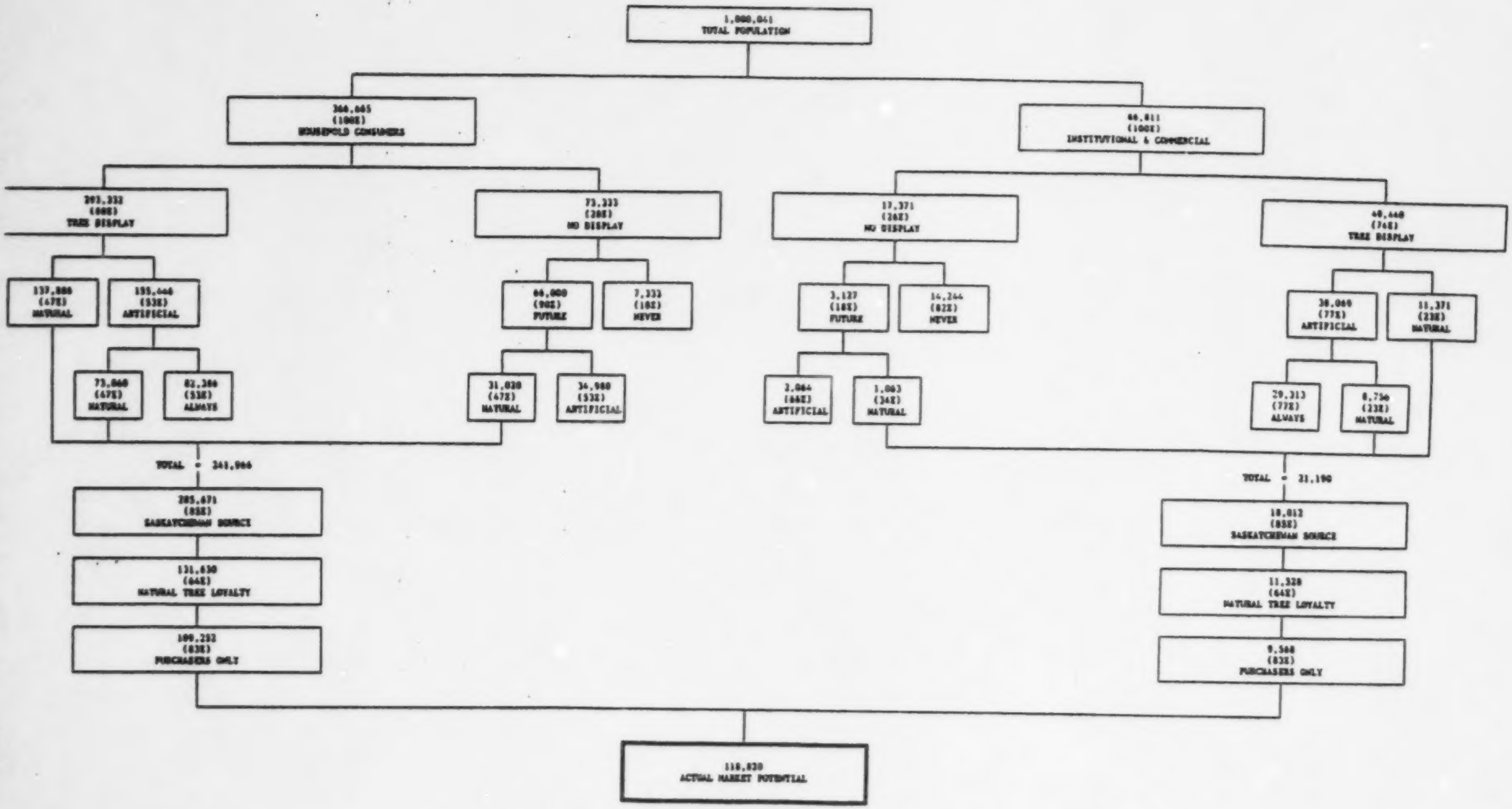
1,000,041
TOTAL POPULATION
366,665
(100%)
HOUSEHOLD CONSUMERS
66,811
(100%)
INSTITUTIONAL & COMMERCIAL
293,332
(80%)
TREE DISPLAY
73,333
(20%)
NO DISPLAY
17,371
(26%)
NO DISPLAY
49,440
(74%)
TREE DISPLAY
137,866
(47%)
NATURAL
155,466
(53%)
ARTIFICIAL
66,000
(90%)
FUTURE
7,333
(10%)
NEVER
3,127
(18%)
FUTURE
14,244
(82%)
NEVER
38,069
(77%)
ARTIFICIAL
11,371
(23%)
NATURAL
73,069
(47%)
NATURAL
82,396
(53%)
ALWAYS
31,020
(47%)
NATURAL
34,980
(53%)
ARTIFICIAL
2,064
(66%)
ARTIFICIAL
1,063
(34%)
NATURAL
29,313
(77%)
ALWAYS
8,756
(23%)
NATURAL
TOTAL = 241,966
TOTAL = 21,190
205,671
(85%)
SASKATCHEWAN SOURCE
131,630
(64%)
NATURAL TREE LOYALTY
109,252
(83%)
PURCHASERS ONLY
18,012
(85%)
SASKATCHEWAN SOURCE
11,528
(64%)
NATURAL TREE LOYALTY
9,568
(83%)
PURCHASERS ONLY
118,820
ACTUAL MARKET POTENTIAL

Figure 2. Market Potential Flow Chart

3.2.2 The Economy

If climatic & price trends continue in adverse directions, the economy will continue to falter. The result will be less consumer spending power in 1995 than in 1988-89, actually lowering the market potential for items such as natural Christmas trees. If the Province, generally, and agriculture sector, specifically, can recover from the drought conditions, the market will stabilize, but not increase markedly.

3.2.3 The Population

As previously mentioned, there are no significant increases anticipated for Saskatchewan's overall population into the 1990's. Saskatchewan is expecting growth in the mining, forestry and possibly the utility sectors, resulting in population increases on a per community basis, generally found along the Forest Fringe or within the Commercial Forest zones.

There is a trend showing people, mainly younger generations, leaving rural towns & villages for either Saskatoon, Regina or exiting the Province completely. This trend will continue if Saskatchewan's economy continues to falter, failing to offer young people new opportunities and careers.

3.2.4 Housing Starts

Similarly, the housing starts trend will follow Saskatchewan's economic track, ultimately affecting the natural Christmas tree market by reducing the number of potential consumers (households).

3.2.5 Natural & Artificial Tree Imports

3.2.51 Natural Trees

As mentioned in the following recommendations, this may be a key factor in the SCTGA's success. Based on an anticipated declining economy and a reduced population (consumer), the SCTGA should make efforts to protect the domestic market that remains. The United States may already supply approximately 2.5% of Canadian homes with natural Christmas trees. The total elimination of trade barriers (occurring in 1987 with the lifting of the 30% tariff) has resulted in drastic increases in the amount of American tree imports into Canada. As long as large American suppliers can produce trees cheaper than their Canadian counterparts, the American dollar remains more powerful than the Canadian dollar, and the present no-tariff situation continues between the two countries, there will be no significant changes occurring up to 1995.

Natural tree import values in Canadian dollars are the only figures available through Statistics Canada (see Appendices Report, Appendix V). The SCTGA should look into obtaining American natural Christmas tree export data, through United States Customs authorities, to document the factual numbers, rather than just the values, of these trees each year.

3.2.52 Artificial Trees

Hong Kong, Taiwan and the Peoples Republic of China will continue to compete for the Canadian market, by supplying increased volumes of reasonably priced, high quality artificial trees. These countries are fully capable of flooding the potential market over the next decade, as they have done with most other products. The intrusion of the Pacific Rim artificial tree will reduce the total market potential substantially, unless the SCTGA can secure the market through advance promotion.

3.2.6 Natural Tree Exports

The American market for Canadian trees has remained relatively stable, increasing slightly over the past decade. No major changes in this situation are anticipated.

The overseas market was a significant one in the 1970's, and perhaps this can be investigated further by the SCTGA membership as a potential for exports from Saskatchewan. However, the year 1995 should remain a domestic supply year, followed by years of securing this domestic market. Once this has taken place, priorities should be set accordingly. For example:

- **1st Priority : SASKATCHEWAN MARKET**
- **2nd Priority : CANADIAN MARKET**
- **3rd Priority : AMERICAN MARKET**
- **4th Priority : OVERSEAS MARKET**

3.2.7 Safety Awareness

Artificial trees have been perceived, by the Saskatchewan general public, as a safer and more convenient Christmas tree than naturals. This trend will not change unless an Association, such as the SCTGA, can offer a continued promotional & educational campaign, developing consumer awareness of natural tree attributes and, perhaps, the negative aspects of artificial tree usage (ie. unnatural, toxic properties, etc.).

3.2.8 The Environment

The environment crisis is expected to become more critical by 1995. A promotion campaign, directed at the benefits to the environment of growing trees, may secure the naturalist component of the population; the farmers. The city-dweller, who bases his/her decisions on media presentations, must be given the opportunity to see the benefits of natural tree "farming".

3.2.9 Summary

In summary, only two (2) scenarios will increase the 118,820 natural tree potential by a significant amount:

- a substantial increase in market size (consumers)
- access to out-of-Province markets

As the population of Saskatchewan is not likely to increase, out-of-Province markets should be investigated to secure, by promotion, a substantial share of the existing market.

As shown on the market flow chart, the total market in 1988 is 366,665 Consumers + 66,811 Establishments (institutional & commercial). This total of 433,476 is not likely to change significantly, regardless of any trends. The SCTGA should put all efforts into capturing this total market, which is approximately 300,000 trees over the actual market potential of 118,820.

4. PROMOTION & MARKETING RECOMMENDATIONS

The following list of recommendations are summarized according to priority of implementation. The Christmas tree market in the 1990's will be an extremely competitive one, requiring not only time & money, but perhaps more importantly, a lot of hard work.

4.1 RETAILER & GENERAL PUBLIC AWARENESS

The majority of households & retailers in Saskatchewan were not aware of the SCTGA. Although a market study, such as this one, does help increase public awareness, it should be a priority for the SCTGA to at least maintain correspondence with the retailers interested in obtaining trees from Saskatchewan sources.

4.1.1 Retailers

Key market chain elements requiring immediate SCTGA action include: Saskatchewan Community Club organizations (Kinsmen & Kiwanis, etc., city, town & village locations); retail regional chains owned & operated independently (e.g. Canadian Tire stores); and the large supplier/retailers for the regional retail chains (Zellers, K-Mart, Woolco, etc.). These supplier/retailers have rental/lease agreements with the regional retail chains' garden supply centres extending to locations in Manitoba & Alberta. Some interest has been expressed to, at least, partially replace their present sources of trees.

General comments taken from the retailer survey indicate a need for an SCTGA live tree catalogue displaying the species, sizes and prices available to the retailers.

Emphasis must be placed on supplying excellent quality trees to all retailers, and ultimately, to the consumer. It is the consumer that will judge whether or not, firstly, he/she will buy the tree, and secondly, whether he/she will be a repeat purchaser.

4.1.2 General Public

A frequent comment given during the telephone interviews with Saskatchewan residents was that they were unaware of the SCTGA. However, they expressed a genuine interest in a Saskatchewan-grown product. Thus, the SCTGA must supply information sheets about Christmas tree facts, safety, and general tree care now, through existing retailers, in order to reach the natural tree buyer.

Additional market surveys (discussed further in this section) is another promotional technique that should be used for this purpose. Ensure the interviewer conducting the survey is well-informed on all aspects of SCTGA, so that any inquisitive individuals with general Association-related questions, safety or environmental concerns, can be answered swiftly & accurately.

In addition to market surveys, no other time will the SCTGA come into direct contact with the consumer until the pre-Christmas sales period. This Survey's results have shown that the majority of consumers shop for their tree approximately two (2) weeks before Christmas Day. Thus, any information sheet, promotional campaigns, etc., should be concentrated on this bulk sales time period.

4.2 CHRISTMAS TREE SAFETY AWARENESS

Recent developments, particularly in the Regina area, questioning the safety of displaying a natural Christmas tree in public buildings, has the SCTGA, retailers & the general public concerned about the future of the natural Christmas tree. These concerns have already turned into reduced sales of natural trees, directly related to a ban on natural trees in any public building in Regina.

To refute these concerns, the SCTGA requires firm statistical support from studies, reports & personal interviews, so that the general public, and more directly, the retailer, can defend the safety of the natural tree against misquoted statistical information.

Moreover, fire marshals & inspectors in every Saskatchewan city should be provided with these factual materials to attempt to reduce the growing number of communities preventing the natural tree from being displayed in public buildings and, ultimately, individual households. In addition, the SCTGA should prepare a list of Saskatchewan communities that have already set municipal by-laws or restrictions, so that Association members can concentrate on these cities/towns/villages.

4.3 CONTINUOUS MARKET ANALYSIS

The Saskatchewan market must be annually surveyed for:

- changing consumer attitudes about Christmas tree type selections;
- new or no longer existent market chain elements;
- developing or changing tree species' preferences; and
- public awareness facts.

By utilizing similar questionnaire formats as those presented in this Market Study, the SCTGA can monitor the previously-mentioned market elements, to develop valuable trend information and forecast the behaviour of these elements in the 1990's, when the bulk of SCTGA trees become marketable.

Some questions, in addition to the 1988 questionnaire format, which should be asked to ascertain trend information, are covered in Points 4.3.1, 4.3.2 & 4.3.3 below.

4.3.1 Households

(a) To obtain consumer loyalty values to individual retailers:

- **Did you shop at the same place as you did last year?**

(b) A new approach that offers the SCTGA some assurance that the species of tree displayed is the one that he/she indicates as such. Although the survey results indicated that 65% of consumers did recognize the species of the natural Christmas tree displayed, there was no sure way of determining a correct consumer species identification.

- **Species of natural Christmas tree displayed?**

(c) It is necessary to determine whether consumer tree watering habits are compatible with the size of the stand. For example, a large three (3) gallon container should require less frequent watering than a smaller one-half (½) gallon container.

- **Actual size of natural tree stand utilized by the household?**

4.3.2 Institutional & Commercial Establishments

(a) 1988 survey results indicate that 52% of natural tree purchasers from these establishments are "other staff members", as opposed to 43% being the management staff or boss. Therefore, the SCTGA must determine the position of the person in charge of the decisions, regarding Christmas tree display, and on what is his/her decision based (i.e. recommendations from headquarters).

- **Actual position held by person who makes the decision to display a natural or artificial Christmas tree?**

(b) Forty-seven percent (47%) of no-tree establishments quoted "office too small" as the major reason for not displaying a Christmas tree. The SCTGA can determine the approximate size or condition of these establishments, based on, for example, the number of employees or presence/absence of front lobby.

- **Actual size and types of establishments?**

4.3.3 Retailers

Attempt a different retailer survey approach, strictly in person, testing actual retailer knowledge on general natural Christmas tree facts, which could include:

- set-up & maintenance;
- safety awareness; and
- consumer desired tree attributes.

4.4 MAINTENANCE OF RECORDS

It is essential that accurate records are kept up-to-date on existing members' plantation growing stock, including species type & quantity, to avoid an over-supply situation in Saskatchewan.

This record accounting is also necessary to prevent the forced situation of trying to market trees quickly, in other Provinces or States, where such an over-supply situation may already exist.

4.5 CONSUMER PROFILING & FLEXIBILITY

The profile of Saskatchewan households, provided under the Market Potential section of this report (Table 1), is meant to generally describe each of the tree user groups. Clearly, not all households will fall under such categorization.

However, in order for the SCTGA to meet the full market potential for Saskatchewan, the artificial tree user groups must be concentrated on. The following list summarizes the ways to convert this section of the market:

- diversify tree heights (particularly smaller trees < 5-6 feet) to capture the >55 years age group which dislikes the hassle of setting up a large tree;
- provide tree bags and promote the freshness & quality of a Saskatchewan-grown tree, to sway the <35 year age group's common complaint of natural tree messiness; and
- promote a cheaper, yet rugged tree to lure the Saskatchewan households earning incomes of <$30,000.

4.6 CHOOSE & CUT OPERATIONS

The 'choose & cut' operation offers householders not only an opportunity to experience the outdoor feeling or event, but perhaps more importantly, a guarantee of the tree's freshness & quality. Considering the recent developments & attitudes about natural Christmas tree safety in the home, the choose & cut consumer does not have to rely on a temporary lot retailer's word regarding when the tree was actually cut.

Other benefits of this type of operation include the opportunity for the whole family to participate in the choosing of a fully exposed tree as opposed to one that has been bundled or wrapped, and the opportunity for the supplier/retailer to offer Saskatchewan consumers a "new" approach to selecting a Christmas tree.

4.7 TREE GRADING SYSTEMS

The results of the retailer questionnaire, presented in this Study, indicate that a tree grading system would be beneficial to both the consumer & retailer.

A color-based coding system that can be readily seen by the consumer could prove to be the simplest approach. However, due to the high number of out-of-Province trees entering Saskatchewan each year, the SCTGA membership must push for such a standardization to also occur in Alberta & British Columbia. Without the cooperation of these Provinces, the effect of a grading system on retailers' & consumers' attitudes may be minimal.

4.8 THE CHRISTMAS TREE DERIVATIVE MARKET

The results of this Survey have indicated that artificial wreaths are commonly purchased by householders, for either themselves or to be given as gifts, due to their less expensive price range.

Natural wreaths tend to be home-made, and more expensive to purchase than artificial wreaths.

A potential market of approximately 50,000 natural wreaths does exist, if the SCTGA membership can offer a relatively cheap (<$15.00) natural wreath to capture the artificial wreath consumer market.

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SCTGA

MARKET STUDY

APPENDICES REPORT

SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION

MARKET STUDY

APPENDICES REPORT

Prepared & Submitted

to **SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION**

by **INTERNATIONAL FORESTSEARCH (CANADA) LTD.**

March 23rd, 1989

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FOREWORD

This Final Report, requested by the SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION, represents the current and projected Christmas Tree market conditions in Saskatchewan.

The findings of the Study, owing to their extent, are presented in two (2) separate reports:

MAIN REPORT : The Market Potential, Promotional & Marketing Recommendations including an Introduction to the Study and its objectives.

APPENDICES REPORT : The Study Support Data, including

- Project Methodology
- Analysis of Consumer, Institutional & Commercial, and Retailer Responses
- Export/Import Analysis
- General Study Support Statistics

Therefore, these two (2) reports form an inseparable unit to the reader.

APPENDIX I

PROJECT METHODOLOGY

INTRODUCTION

This Appendix provides full details on the Market Study methodology, including research, survey design, questionnaire development, and telephone & mail survey procedures.

Although quite intensive in every respect, this Appendix is meant to fully provide the SCTGA with all aspects of the project methodology for their own use, so that future surveys can not only be successfully carried out, but further improved upon.

A. RESEARCH

The vast amount of pre-requisite research, before and during this Study, necessitated a narrowing of the scope, utilizing only essential documents directly related to the project's objectives. Time constraints prevented the use of all requested information. Any missing key documentation related to the full scope of this Market Study is noted under each of the sources found below. Although the bulk of recent statistical support was readily available, generally trend information from 1977 to 1988 was the most difficult to obtain.

MARKET SURVEYS

Approximately eight (8) past market surveys conducted in various locations throughout the United States and Canada were thoroughly examined for study design, format & content, including approaches to data analysis. Special attention was paid, initially, to the 1987 SCTGA Market Study, to clarify which of the objectives were fully met and which could be expanded on, to provide a Province-wide, detailed Market Survey.

The following Table summarizes market surveys reviewed before, during and after the project commencement date (November 19th/88):

Table 1. SUMMARY OF PAST MARKET SURVEYS

YEAR	SURVEY LOCATION	SURVEYOR
1973, 1974	Missouri, U.S.A.	University of Missouri
1987	Ohio, U.S.A.	Wilmington College
1985	Pennsylvania, Washington D.C., U.S.A.	Pennsylvania State University
1987	Washington, U.S.A.	Washington State University
1987	Indiana, U.S.A.	Unknown
1987	Winnipeg, Manitoba, Canada	Department of Natural Resources
1987	Ontario, Canada	Ministry of Natural Resources
1987	Saskatchewan, Canada	Saskatchewan Christmas Tree Growers Association

GOVERNMENT AGENCIES

Table 2, below, lists the various government departments contacted via personal interview, telephone, telex, telefax or mail, to obtain the most accurate information base possible.

Statistics Canada can provide 1977-88 data related to census population, import & export statistics of Christmas trees by Province, State or Country. However, most of this information was not available at the time of project write-up.

Table 2. GOVERNMENT AGENCIES CONTACTED

GOVERNMENT AGENCY	LOCATION	REQUESTED INFORMATION
FEDERAL		
Forestry Canada	Prince Albert Sault Ste. Marie Ottawa	Diverse Christmas Tree Market Surveys; Canada-wide Christmas Tree Growers' Assoc.; 1987 Saskatchewan Christmas Tree Market Info.
Dept. of Regional Industrial Expansion	Ottawa	1977-88 Christmas Tree Import & Export Info.; Diverse Christmas Tree Growers Assoc. Info.
Statistics Canada	Regina	1977-88 Diverse Import & Export Info. by Province & Country; Diverse Sask. Housing & Business Statistics; 1986 Census Data Information
Canada Mortgage & Housing Corp.	Saskatoon	1988 Diverse Housing Info.
PROVINCIAL		
Sask. Dept. of Housing	Regina	1977-88 Diverse Housing Characteristics Info.
Sask. Dept. of Urban Affairs	Regina	1987 Saskatchewan Business & Housing Info.
Sask. Dept. of Labour	Regina	Provincial & Municipal Fire Regulations & Building Codes; Diverse Christmas Tree Safety Info.
Sask. Dept. of Health	Regina Prince Albert	1988 Saskatchewan Population Statistics
Sask. Power Corp.	Prince Albert	1987 Saskatchewan Housing & Business Info.
Sask. Telecommunications	Prince Albert Regina	Directory Information
Sask. Dept. of Tourism, Small Business & Cooperations	Prince Albert	Diverse Population, News Media, Christmas Tree & Ornament Retailing Information
MUNICIPAL		
Taxation & Business Licensing Depts.	13 Saskatchewan Cities (>5000 pop.)	Lists of Itinerant Businesses during the 1988 Nov. 15-Dec. 25 time period.
Fire Departments	Regina Saskatoon Prince Albert	Christmas Tree Safety Info.

ASSOCIATIONS

The following public Christmas Tree Grower Associations were contacted for past & present production data, price structures, memberships and a diverse assortment of general information:

- Canadian Christmas Tree Growers Association;
- various Provincial Christmas Tree Growers Associations; and
- National Christmas Tree Growers Association.

The Canadian and various Provincial Growers' Associations had not replied to their respective requests for information at the time of project write-up.

CHRISTMAS TREE RETAILERS

The 1987 SCTGA Market Study and the retailer list which accompanied this document, was perused & tabulated to form the base for the mail survey. This list was updated to confirm existing mailing addresses & contact telephone numbers through:

- 1988 Saskatchewan Telecommunication Telephone Directories;
- personal conversations with government officials, SCTGA members & existing retailers; and
- media monitoring (see following page).

Approximately twenty (20) retailers were personally visited in Prince Albert, Saskatoon and Regina, during and after the Christmas tree sales period. These visits were necessary to obtain the views and concerns of the retailers "on the street", rather than totally relying on the mail survey responses. In fact, many retailers expressed a real interest in the survey during these personal visits, however, they failed to return the mail survey, even when presented with an extra copy.

Appendix IV fully documents the names & locations of these Retailers, and their responses to the questionnaire.

MEDIA MONITORING

A total of thirteen (13) daily & weekly Saskatchewan newspapers were monitored for existing Christmas tree retailer advertisements. The quality & location of the ad within each publication was intensively documented, for the purpose of identifying new (1988) retailers, promotional techniques and the costs associated with public advertising.

Actual locations, names & frequency of these newspapers included:

LOCATION	NAME	FREQUENCY
PRINCE ALBERT	DAILY HERALD	DAILY
	SHOPPER	WEEKLY
	FOCUS	WEEKLY
	TRADING POST	WEEKLY
LA RONGE	THE NORTHERNER	WEEKLY
SHELLBROOK	CHRONICLE	WEEKLY
MELFORT	JOURNAL	WEEKLY
	ADVANCE	WEEKLY
KINISTINO	POST	WEEKLY
TISDALE	RECORDER	WEEKLY
SASKATOON	STAR PHOENIX	DAILY
	MIRROR	WEEKLY
REGINA	LEADER POST	DAILY

Appendix IV fully documents the number & location of advertisements within these newspapers.

B. SURVEY DESIGN

TELEPHONE SURVEYS

Saskatchewan households (consumers) and institutional & commercial establishments were identified as key market chain elements requiring a thorough market assessment based on sound statistical support. In close cooperation with the SCTGA, it was confirmed that all cities (population >5,000) would be surveyed. Towns (population between 1,000 - 5,000) & villages (populations <1,000) were chosen for their ability to reflect Saskatchewan ecoregions (see Appendix II, Section A), proximity to larger population centres, and the relative distance between the respective towns & villages.

A telephone interview was the selected mode of survey with community households due to the requirement of sampling a large population within a restricted time schedule. The immediate post-Christmas (January/89) telephone surveying period was chosen for having a high probability of contacting individuals at home, as well as ensuring clear recollection of the Christmas Holiday season.

Table 3 (following page) summarizes the number of completed calls per community for the consumer and institutional & commercial establishments.

MAIL SURVEY

Utilizing all previously mentioned research materials, it was confirmed by the SCTGA Executive, that retailers must be approached in the most non-threatening manner possible, to re-emphasize the Association's objectives of ensuring an excellent SCTGA - Retailer relationship.

In order to reach as many potential (and not previously contacted) retailers as possible, the addresses for all existing community clubs & municipal organizations were obtained, in addition to the confirmed 1988 retailer list.

Therefore, a mail survey to Christmas tree retailers during the latter part of the tree-selling sales period was selected, to obtain accurate sales data and to assess the number of retailers truly interested in the Saskatchewan Christmas Tree Growers Association.

Table 3 (following page) summarizes the communities selected, the number of potential & confirmed Christmas tree retailers, and the number of retailer respondents.for each type of questionnaire.

Table 3. SASKATCHEWAN SURVEY COVERAGE

CITY/TOWN/ VILLAGE	COVERED POPULATION	CONSUMER*	INSTITUTIONAL-COMMERCIAL*	TOTAL CALLS*	POTENTIAL RETAILERS	CONFIRMED RETAILERS	TOTAL RESPONDENTS
CITY							
SASKATOON	183,487	82 (16)	23 (1)	105 (17)	34	22***	5
REGINA	179,400	93 (13)	12 (0)	105 (13)	20	6***	2
MOOSE JAW	35,522	17 (3)	8 (0)	25 (3)	18	8***	3
PRINCE ALBERT	34,369	17 (1)	8 (1)	25 (2)	21	15	7
SWIFT CURRENT	16,144	17 (1)	5 (0)	22 (1)	12	6	1
YORKTON	16,121	12 (1)	10 (0)	22 (1)	12	7***	1
NORTH BATTLEFORD	14,745	16 (5)	4 (0)	20 (5)	11	4	1
ESTEVAN	10,498	15 (2)	4 (0)	19 (2)	10	3	1
WEYBURN	10,347	15 (5)	4 (0)	19 (5)	9	1	
LLOYDMINSTER	6,960	14 (7)	3 (1)	17 (8)	8	4	
MELFORT	6,296	11 (1)	6 (0)	17 (1)	5	1	
MELVILLE	5,353	11 (1)	6 (0)	17 (1)	6	1	
KINDERSLEY	5,059	13 (5)	4 (0)	17 (5)	6	3	1
REPRESENTATIVE TOWNS							
MEADOW LAKE	4,188	12 (3)	4 (1)	16 (4)	5	N/A	
ASSINIBOIA	2,991	9 (2)	5 (0)	14 (2)		1	1
ROSETOWN	2,808	10 (5)	4 (0)	14 (5)			
CANORA	2,595	11 (3)	3 (0)	14 (3)			
MAPLE CREEK	2,517	11 (2)	3 (0)	14 (2)			
WADENA	1,717	9 (2)	2 (0)	11 (2)			
GRENFELL	1,267	8 (1)	3 (0)	11 (1)			
DAVIDSON	1,232	8 (1)	3 (0)	11 (1)			
MAIDSTONE	1,114	10 (1)	1 (0)	11 (1)			
LEADER	1,073	10 (2)	1 (0)	11 (2)			
REPRESENTATIVE VILLAGES	7,500**						
WATSON		8 (2)		8 (2)			
STOUGHTON		8 (0)		8 (0)			
ROCKGLEN		7 (2)	1 (0)	8 (2)			
FOX VALLEY		8 (3)		8 (3)			
EATONIA		8 (3)		8 (3)			
KENNASTON		8 (3)		8 (3)			
DELISLE		8 (5)		8 (5)			
PENSE		8 (4)		8 (4)			
PONTEIX		7 (1)	1 (0)	8 (1)			
COLEVILLE		8 (4)		8 (4)			
TOTALS	553,303	509 (110)	128 (4)	637 (114)	177	82	23

*Brackets represent number of refusals.
**Estimated average population per village: 750.
***Signifies Retailers Present in more than one City.

C. QUESTIONNAIRE DEVELOPMENT & TELEPHONE PROCEDURES

TELEPHONE SURVEY NUMBER SELECTION

Ten (10) 1988 Sask Tel directories were obtained for initial perusal. Each city, town & village was then summarized according to the following parameters:

- maximum number of pages per city/town/village;
- four (4) columns of telephone numbers per page; and
- maximum number of rows per column.

IFSC's Lotus 1-2-3 program then randomly selected numbers according to the above-mentioned parameters, to ensure the least possible biased sampling procedures.

Figure 1 lists an example of the randomly selected pages, columns & rows, by municipality. These lists were then used to manually select the telephone numbers from each directory.

```
-----------------------------------------------
!            CHRISTMAS TREE SURVEY            !
!        NAME OF CITY\TOWN TO SURVEY:         !
!                   REGINA                    !
! --------------------------------------------!
! # OF CALLS!     PAGE    COLUMN         ROW  !
! (1 TO 150)! (1 TO 228)(1 TO 4)  (1 TO 105)!
! ------------------------------------------  !
!          1 !        42       2          60  !
!          2 !        47       4          73  !
!          3 !       132       2          52  !
!          4 !        97       2          75  !
!          5 !        29       3          50  !
!          6 !       145       4          29  !
!          7 !        24       3          13  !
!          8 !        75       1          82  !
!          9 !       137       1          11  !
!         10 !       202       3          11  !
!         11 !       125       2          78  !
!         12 !        86       3          66  !
!         13 !       102       2          70  !
!         14 !       107       3          17  !
!         15 !        46       1          60  !
!         16 !       102       3         102  !
!         17 !       219       1          85  !
!         18 !        83       1          81  !
!         19 !       155       4          11  !
!         20 !        86       4          96  !
!         21 !       202       3          98  !
!         22 !       123       2          33  !
!         23 !       133       1          62  !
!         24 !        90       3          29  !
!         25 !        69       3         103  !
!
```

Figure 1. Randomly Selected Telephone Number List

Occasionally, when the listed parameters fell outside of a particular municipality's column or row listing, the selection was manually deleted (crossed out) and another selection was made. This procedure continued, in order of appearance, until the required number of telephone selections per municipality were made.

Due to the presence of Institutional & Commercial telephone numbers listed amongst residential numbers, our initial estimate of 572 residential & 65 institutional & commercial calls shifted to 509 & 128 respectively, by completion time of all telephone surveying (January 31st/89).

TELEPHONE CALL PROCEDURES

The following list summarizes the procedures undertaken by IFSC staff during actual telephone circumstances:

(1) Busy Signal / No Response

The residence (or business) received a minimum of three (3) telephone calls, on three (3) different days. If no answer was received, the interviewer selected the next telephone number, directly beneath the initial selection, and this number received the minimum of three (3)telephone calls. If, by the end of the sixth (6th) try, no response was obtained, the telephone number beneath this second selection was used. This third (3rd) selection, and all remaining selections, were called only once in order to hasten the calling procedure.

In addition, the previously mentioned three (3) calls per household (if no answer was obtained) was necessary to prevent increased biased sampling. Each household/business had equal opportunity to be sampled on at least two (2) weekdays and one (1) weekend day.

(2) Telephone Out-of-Service

This contact resulted in selecting the number directly beneath the initial selection.

(3) Column Completion

If procedures 1 & 2 resulted in a completed column (ie. bottom of a page), the next telephone number was selected at the location immediately above the first number selected.

(4) Time of Call

All calling was conducted between 7:00 P.M. - 10:00 P.M. on weekdays and Saturdays. The Sunday time period for calling occurred between 1:00 P.M. - 5:00 P.M., and 7:00 P.M. - 10:00 P.M.

All institutional & commercial calls were conducted during normal business hours (9:00 A.M. - 5:00 P.M.), unless the type of establishment necessitated evening calling hours (i.e. Community Clubs).

These times were considered most appropriate to obtain the majority of people home in the evenings, rather than during the working day.

INTRODUCTION TO QUESTIONNAIRE

All IFSC Interviewers were informed of proper telephone interview etiquette before initiation of the actual survey. Figure 2 illustrates the standard introduction of the caller to the resident/business selected. A pleasant, polite & inquisitive voice control proved to be the best method of approach, to ensure a completely answered questionnaire. Upon conclusion of the introduction, the respondent generally expressed their willingness/unwillingness to be interviewed.

Figures 3 & 4 are sample Consumer, Institutional & Commercial questionnaire formats used throughout the telephone survey. The questionnaire design was developed & closely coordinated to meet the general objectives of the SCTGA, utilizing the research materials described under Appendix I, Section A, and through many meetings with the SCTGA executive.

The City of Prince Albert was initially surveyed as a test to confirm the relative success/failure of these formats in actual telephone interview situations. This test resulted in only minor changes to individual questions, adding additional space for individual comments or negative answers, depending on the answers given. For example, Consumer Survey Question No. 28 required additional room for respondents who did not know the length of time they have used their artificial tree.

REFUSALS

Although limited in number, approximately 22% of the population would not respond to the questionnaire process. Some of the reasons for declining included:

- not interested;
- too busy; and
- religious reasons.

All interviews of this kind were ended swiftly with a "Thank You" (for your time) and the next telephone number was chosen from the list.

CONSUMER INTRODUCTION

Good (morning/afternoon/evening)! My name is ______________________________, of International Forestsearch Ltd., a forestry consulting company of Prince Albert. On behalf of the Saskatchewan Christmas Tree Grower's Association (S.C.T.G.A.), I am carrying out a survey of Saskatchewan households about their Christmas tree purchases over the past Holiday Season.

The questionnaire's results will determine if Saskatchewan consumers, such as yourself, will prefer to see locally-grown Christmas trees available on the Saskatchewan market.

If I may, I would like to ask you a few questions, taking up only a few minutes of your time. No record will be made or kept of your name and your answers will be combined with hundreds of others in this survey, merely to show market trends, keeping them confidential.

Figure 2. Sample Telephone Survey Introduction

Figure 3. Consumer Telephone Questionnaire

SASKATCHEWAN CHRISTMAS TREE GROWERS ASSOCIATION
MARKET STUDY SURVEYS

CONSUMERS

QUESTIONNAIRE Nº ______

PLACE ☐ City ____________________

☐ Town ____________________

☐ Village ____________________

HOUSEHOLD DATA

FAMILY MEMBERSHIP	**HOUSING TYPE**	**TOTAL FAMILY INCOME ($)**
☐ Couple	☐ Single detached	☐ < 20,000
☐ Single Parent	☐ Single attached	☐ 20,000 - < 30,000
☐ Single	☐ Apartment	☐ 30,000 - < 40,000
☐ No. of Children ______	☐ Duplex	☐ 40,000 - 50,000
└→ Age ☐ under 12 ___	☐ Row House	☐ > 50,000
☐ over 12 ___	☐ Double House	
☐ Other in-house dependents ________		

RESPONDENT DATA

SEX ☐ Male

☐ Female

AGE CLASS (years)

☐ 18 - < 25

☐ 25 - < 35

☐ 35 - < 45

☐ 45 - < 55

☐ 55 - 65

☐ > 65

OCCUPATION of Head of Household: ____________________

IFS DATA

Phone Nº ____________________

Hour called: ☐ AM _____

☐ PM _____

Day _____ January, 1989

Interviewer Initials ________

Signature ____________________

1. Did you display a Christmas tree this past Holiday season?
   - ☐ yes (go to Q.6)
   - ☐ no (go to Q.2)

2. Can you tell us why not?
   - ☐ away for the Holidays
     - → 2.1 If at home, would you have had a Christmas tree?
       - ☐ yes
       - ☐ no
   - ☐ too much trouble
   - ☐ too expensive
   - ☐ illness, age, death in family
   - ☐ household too small
   - ☐ no children
   - ☐ children grown up/moved away
   - ☐ religious reasons
   - ☐ other ____________________

3. However, have you had Christmas trees in past years?
   - ☐ yes
     - → 3.1 ☐ always
       - ☐ often
       - ☐ sometimes
       - ☐ once
   - ☐ never

4. Are you planning to have a Christmas tree in the future?

☐ yes

→ 4.1 ☐ natural

☐ artificial

☐ no

5. Did you, however, celebrate the Holidays in any of the following ways?

☐ hanging Christmas stockings

☐ having flowers & plants instead of a tree

☐ having a special meal

☐ sending cards

☐ giving gifts

☐ vacationing abroad in the sun

☐ none of the above ways

☐ other ______________________

(Go to Q.33)

6. Was the tree

☐ natural? (go to Q. 7)

☐ artificial? (go to Q. 27)

☐ both? (go to Q.7)

7. Can you tell me who in your family purchased the natural Christmas tree?

☐ husband

☐ wife

☐ parent

☐ family as a whole

☐ no

8. Does this **family member** purchase the Christmas tree each year, or does it change?

☐ every year

☐ changes

☐ don't know!

9. Please give a reason or reasons why you chose a natural tree:

☐ tradition

☐ like a real tree

☐ fragrance

☐ like to plant outdoors

☐ dislike artificial trees

☐ other ______________________

10. Where did you purchase/get the tree?

☐ temporary lot (go to Q.11)

☐ garden/nursery
  → 10.1 Name ______________________

☐ choose & cut in woodlot
  → 10.2 Name ______________________

☐ retail store
  → 10.3 Name ______________________

☐ charitable organization
  → 10.4 ☐ club
    ☐ church
    ☐ school
    ☐ other _______________

(garden/nursery through charitable organization) → (go to Q.13)

☐ cut in woods
  → 10.5 Where ______________________

☐ received as a gift

11. Do you know how long has this lot has been operating?

    ☐ many years back

    ☐ the last five years

    ☐ last Christmas only

    ☐ don't know

12. Do you know how many places you shopped to buy the tree?

    ☐ one

    ☐ two or three

    ☐ four or more

13. How much did you pay for the tree?

    ☐ less than $10.00

    ☐ $10.00 - $19.00

    ☐ $20.00 - $29.00

    ☐ $30.00 - $39.00

    ☐ $40.00 - $49.00

    ☐ $50.00 & over

    ☐ don't know

14. What were the most common characteristics you looked for when buying a tree?

    ☐ shape

    ☐ fullness

    ☐ freshness

    ☐ straight trunk

    ☐ type of tree

    ☐ price

    ☐ color

    ☐ fragrance

    ☐ other ______________________

15. Are you satisfied with the Christmas tree you purchased?
    - ☐ yes (go to Q.17)
    - ☐ no (go to Q.16)

16. Why not?
    - ☐ price
    - ☐ looked better in the yard/lot
    - ☐ difficult to set-up
    - ☐ needles fell down early
    - ☐ clean-up
    - ☐ other ______________________

17. Do you recognize the species of your Christmas tree?
    - ☐ yes
      - → 17.1 ☐ spruce
      - ☐ fir
      - ☐ pine
    - ☐ no

18. Do you know where the tree came from?
    - ☐ Saskatchewan
    - ☐ British Columbia
    - ☐ U.S.A.
    - ☐ other ______________________
    - ☐ don't know

19. How often do you water the tree?
   - ☐ daily
   - ☐ every other day
   - ☐ once/twice per week
   - ☐ less than once per week
   - ☐ did not water the tree

20. Which disposal method did you use?
   - ☐ regular garbage pickup
   - ☐ special garbage pickup
   - ☐ took to collection point or dump
   - ☐ bonfires
   - ☐ used for firewood
   - ☐ other ________________________
   - ☐ don't know

21. Compared to an artificial tree, do you think a natural tree is
   - ☐ safer
   - ☐ the same
   - ☐ less safe, but with proper care, no problems
   - ☐ don't know?

22. How loyal are you to the natural Christmas tree?
    - ☐ have always had only natural trees
    - ☐ tried artificial, but returned to natural
    - ☐ have both natural & artificial
        - → 22.1 How often do you display the artificial tree?
            - ☐ every year
            - ☐ almost every year
            - ☐ only once in a while
            - ☐ this is the first year
    - ☐ have always had artificial, but changed to natural this year
        - → Why? ____________________

23. Do you think the children would enjoy having a small Christmas Tree of their own?
    - ☐ yes
    - ☐ no
    - ☐ don't know

24. Have you ever displayed two natural Christmas trees?
    - ☐ yes
    - ☐ no

25. How long before Christmas do you usually buy the tree?
    - ☐ one month before Christmas
    - ☐ 3 weeks before
    - ☐ 2 weeks before
    - ☐ 1 week before only
    - ☐ at the last minute
    - ☐ don't know

26. In addition to your Christmas tree, did you celebrate the Holiday in any of the following ways?

☐ hanging Christmas stockings

☐ having flowers & plants

☐ having a special meal

☐ having an artificial Christmas tree

☐ sending cards

☐ giving gifts

☐ other ______________________

*__Note__:
Respondents displaying both natural & artificial trees are to proceed to Q.33

27. Please give a reason or reasons why you prefer an artificial tree?

☐ personal preference

☐ no mess

☐ safety

☐ easy to set up

☐ cost

☐ not having to shop every year

☐ small size

☐ no disposal problem

☐ other ______________________

28. Do you know how long you have used an artificial Christmas tree?

____________ Yr.(s)

29. Did you switch your preference from natural trees to artificial? If so, why?

☐ yes Reason: ______________________

☐ no

30. Do you have complaints about natural trees being displayed in your home?

☐ yes reason: ______________________

☐ no

31. If a genuine, good quality Saskatchewan grown Christmas tree was offered to you, would you switch to a natural Christmas tree?

☐ yes

☐ no

☐ don't know

32. In addition to your Christmas tree, did you celebrate the Holiday in any of the following ways?

☐ hanging Christmas stockings

☐ having flowers & plants

☐ having a special meal

☐ sending cards

☐ giving gifts

☐ other ______________

33. Do you display a Christmas wreath?

☐ yes

→ 33.1 Is it artificial? ☐ (go to Q.34)

Is it natural? ☐ (go to Q.34)

☐ no (go to Q.35)

34. Do you recall how much you paid for it?

$______________ (go to Q.36)

35. Has your household ever purchased a Christmas wreath?

☐ yes

→ 35.1 Is it artificial? ☐

Is it natural? ☐

☐ no (go to Q.36)

36. Do you think that having our own Saskatchewan Christmas Tree Growers Association is

☐ a very good idea

☐ a good idea

☐ a bad idea

☐ don't know

37. Do you have any ideas how the Saskatchewan Christmas Tree Growers Association can help you as a Christmas tree consumer?

☐ better and friendlier service than from current sellers

☐ general information about Christmas trees

☐ how to care for your Christmas tree

☐ replacement at no cost of the tree, if it shows not to be good

☐ lower price

☐ a Saskatchewan made product

☐ other ______________________

38. Has this interview

☐ been informative

☐ bothered you

☐ disturbed your time?

On behalf of the Saskatchewan Christmas Tree Growers Association, I thank you for your collaboration.

HAPPY NEW YEAR!

Figure 4. Institutional & Commercial Telephone Questionnaire

SASKATCHEWAN CHRISTMAS TREE GROWERS ASSOCIATION
MARKET STUDY SURVEYS

1(4)

INSTITUTIONAL & COMMERCIAL

QUESTIONNAIRE Nº ______

PLACE ☐ City ____________________
☐ Town ____________________
☐ Village __________________

BUSINESS DATA

INSTITUTIONAL	COMMERCIAL	LOCATION (Commercial Only)
☐ Bank	☐ Retail	☐ Mall
☐ School	☐ Industry	☐ Plaza
☐ Church	☐ Manufacturing	☐ Apartment Building
☐ Hospital	☐ Services	☐ Other__________
☐ Nursing Home		
☐ Other__________		

RESPONDENT DATA

SEX ☐ Male
☐ Female

AGE CLASS (years)
☐ 18 - < 25
☐ 25 - < 35
☐ 35 - < 45
☐ 45 - < 55
☐ 55 - 65
☐ > 65

OCCUPATION ____________________

IFS DATA

Phone Nº ________________
Hour called: ☐ AM _____
☐ PM _____
Day _____ January, 1989

Interviewer Initials ______
Signature ________________

1. Did you display a Christmas tree this past Holiday Season?
   - ☐ yes (Go to Q.5)
   - ☐ no (Go to Q.2)

2. Can you tell us why not?
   - ☐ too much trouble
   - ☐ never got around to it
   - ☐ fire regulations
   - ☐ city bylaw
   - ☐ office/building too small
   - ☐ other ______________________

3. Have you had Christmas trees in past years?
   - ☐ yes
     - → 3.1 always ☐
     - often ☐
     - sometimes ☐
     - once ☐
   - ☐ never

4. Are you planning on having a Christmas tree in the future?
   - ☐ yes (Go to Q.12)
     - → 3.1 natural ☐
     - artificial ☐
   - ☐ no

5. Was the tree

☐ natural (Go to Q.6)

☐ artificial (Go to Q.9)

☐ both (Go to Q.6)

6. Can you tell me who in your (store, bank, etc.) purchased the tree?

☐ boss

☐ secretary

☐ other ________________________

7. What would be the approximate height of this tree?

☐ > 20 feet

☐ 15 - 20 feet

☐ 10 - 15 feet

☐ 5 - 10 feet

☐ < 5 feet

8 Has your tree been sprayed with a fire retardant substance?

☐ yes (Go to Q.11)

☐ no (Go to Q.11)

9. Do you know how long your establishment has used an artificial tree?

__________ Yr(s).

10. Did your establishment switch their preference from natural to artificial? If so why?

☐ yes; reason:____

☐ no

11. If a genuine, good quality, Saskatchewan grown Christmas tree was offered to your establishment, would you switch to a natural Christmas tree?

☐ yes

☐ no

☐ don't know

12. Do you think that having our own Saskatchewan Christmas Tree Growers Association is

☐ a very good idea

☐ a good idea

☐ a bad idea

☐ don't know

13. Has this interview

☐ been informative

☐ bothered you

☐ disturbed your time?

ON BEHALF OF THE SASKATCHEWAN CHRISTMAS TREE GROWERS & INTERNATIONAL FORESTSEARCH LTD., I THANK YOU FOR YOUR COLLABORATION.

HAPPY NEW YEAR!

D. QUESTIONNAIRE DEVELOPMENT & MAILING PROCEDURES

All retailers identified through the research & design phases of the mail survey received a letter of introduction along with the Retailer Questionnaire (see Figure 5 & 7), during the period of December 19th-21st/88. The SCTGA membership had full input, in the form of ideas & suggestions, into the format and content of the letter (s) & questionnaire.

Retailers failing to respond by January 17th/89 received a follow-up letter (see Figure 6), urging them to reply, and emphasizing the importance of their reply to the accuracy of the Survey results & Final Report, and more importantly, an improved supplier/retailer working relationship.

As mentioned in this Appendix (I, Section A, Table 2), thirteen (13) city halls were contacted by mail, in an additional attempt to locate retailers not previously listed with the SCTGA. This endeavour proved successful, resulting in approximately ten (10) additional questionnaires mailed out to retailers in early January/89.

Figure 5. Initial Introduction Letter to Retailer Mail Questionnaire

Cap. I-32

INTERNATIONAL FORESTSEARCH LTD.
FOREST RESOURCE CONSULTANCY
PO BOX 2468 • PRINCE ALBERT • SASKATCHEWAN • S6V 7G3 • CANADA

PHONE 1(306)764-1840
TELEX 074-29109 IFS PA
CABLE INTERFOR PA
TELEFAX 1(306)763-5529 IFS CANADA

DATE 16/12/88
REF SC/1b-0848/88

Dear Christmas Tree Retailer:

Re. SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION MARKET STUDY

INTERNATIONAL FORESTSEARCH (CANADA) LTD. (IFSC) is conducting a Christmas Tree Market Study, on behalf of the Saskatchewan Christmas Tree Growers Association (SCTGA), as funded by Saskatchewan Agriculture - Agriculture Development Fund.

This is the second year that the SCTGA is behind a market survey, directed to retail outlets such as your firm. If you are not familiar with the SCTGA or the intentions behind this questionnaire, let me answer a few of your questions (please refer to enclosed SCTGA newsletter).

The SCTGA was legally registered as a non-profit co-op in March 1988, and has grown to twenty-four members to-date. A main commitment of the Association is to produce, not retail, Saskatchewan grown Christmas trees of superior quality for retailers such as yourself. Truly, the market survey of 1987, involving fifty-four (54) retailers across the Province, was the start of a business relationship.

In addition, a Stock Acquisition Study, completed by IFSC in early 1988, is intended to provide valuable stock and seed source information to all SCTGA members, ensuring superior stock from day one.

Please find attached, a copy of the 1988 Retailer questionnaire as another example of SCTGA's efforts. Your responses to the questionnaire will provide valuable information to the SCTGA in guiding their long-term efforts to supply high quality, fresh, locally grown Christmas trees to you for the market in the 1990's and beyond.

Once you have completed the questionnaire, simply enclose it in the stamped, return addressed envelope, before January 10th, 1989, if possible, and we'll look forward to receiving your reply for the Association. Please be assured that your answers will be kept strictly **CONFIDENTIAL**, pooled together with hundreds of other responses to show Saskatchewan market trends.

.../2

If you have any questions about this questionnaire, Frank Sudol, SCTGA President, can be reached at 989-4621 in Paddockwood, or you may contact the IFSC office in Prince Albert, Saskatchewan.

Thanking you in advance for your cooperation.

Sincerely,
INTERNATIONAL FORESTSEARCH (CANADA) LTD.

Steve Curtis

Steve CURTIS
Head of Studies

Encl. as stated

cc. Frank SUDOL
    President
    Saskatchewan Christmas Tree Growers' Association

Figure 6. Follow-Up Letter to Retailer Mail Questionnaire

INTERNATIONAL FORESTSEARCH LTD.
FOREST RESOURCE CONSULTANCY
PO BOX 2468 • PRINCE ALBERT • SASKATCHEWAN • S6V 7G3 • CANADA

PHONE 1(306)764-1840
TELEX 074-29109 IFS PA
CABLE INTERFOR PA
TELEFAX 1(306)763-5529 IFS CANADA

DATE 17/01/89

REF SC/1b-0028/89

Dear Christmas Tree Retailer:

Re. SASKATCHEWAN CHRISTMAS TREE GROWERS' ASSOCIATION MARKET STUDY

You are among a select group of Christmas Tree Retailers who are being asked to participate in a Christmas Tree Market Study. Your copy of the Retail Questionnaire form, cover letter and a stamped, self-addressed envelope should have reached you during the last week of December. Although your participation in the Study is voluntary, your answers are essential to providing an accurate assessment of Saskatchewan Christmas Tree market conditions in 1988.

If you have already returned your Questionnaire, please accept our thanks for your assistance and cooperation. If you have not yet completed the Questionnaire, please participate in this Study by returning the completed Questionnaire before January 26, 1989. Even if your retailing business is relatively small or if this is your first year in business, we would like to hear your opinions and answers.

This Study is being conducted by the independent consulting firm, International Forestsearch (Canada) Ltd., under contract to the Saskatchewan Christmas Tree Grower's Association. Your individual answers to the Questionnaire will be handled in a strictly confidential manner by our firm.

The Saskatchewan Christmas Tree Grower's Association will be potential suppliers, not retailers, of trees in Saskatchewan, therefore, any worries about retail competition problems should be put aside.

We urge you to participate in this Study by completing the Retailer Questionnaire as soon as possible. Your answers are very important to this Study.

Thank you for your time and assistance.

Sincerely,
INTERNATIONAL FORESTSEARCH (CANADA) LTD.

Steve Curtis

Steve CURTIS
Project Manager

cc. Mr. Frank SUDOL, SCTGA, President

Figure 7. Retailer Mail Questionnaire

SASKATCHEWAN CHRISTMAS TREE GROWERS ASSOCIATION
MARKET STUDY SURVEYS

RETAILERS

QUESTIONNAIRE Nº ________

RETAILER'S NAME ______________________________

CATEGORY

☐ Regional Chain

☐ Independent Retailer

☐ Service Organization

☐ Sports & Special Interest Club/Group

☐ Religious Club/Group

☐ Itinerant Retailer

☐ Other ______________

PLACE

☐ City ______________

☐ Town ______________

☐ Village ____________

IFS DATA

Mailed out: December ____, 1988

Received Date: ____________

Responsible for mailing : Initials _____ Signature ____________

Responsible for follow-up: Initials _____ Signature ____________

NOTES:

1. How long have you been selling Christmas trees in Saskatchewan?

   ☐ More than ten years

   ☐ 5 - 10 years

   ☐ 2 - 4 years

   ☐ 1 year only (1987)

   ☐ 1988 is the first year

2. Which Christmas tree species did you stock and how many did you sell during the 1988 Christmas tree sales period?

TREE SPECIES	№ ORDERED	№ SOLD	CONSUMER PRICE/TREE	WHOLESALER PRICE/TREE
B.C. Fir (Kootenays)				
Balsam Fir				
Scots Pine				
Sheared Douglas Fir				
Sask. Wild Spruce				
Sask. Wild Fir				
Blue Spruce				
White Pine				
Other ______				
______				

3. From whom and where did you purchase the trees? (Note: If you retail trees which you cut yourself, just indicate the source province.)

TREE SPECIES	FIRST WHOLESALER'S NAME	SECOND WHOLESALER'S NAME	PROVINCE (Sask.) STATE (U.S.A.)
B.C. Fir (Kootenays)			
Balsam Fir			
Scots Pine			
Sheared Douglas Fir			
Sask. Wild Spruce			
Sask. Wild Fir			
Blue Spruce			
White Pine			
Other ______			
______			

4. Did the wholesaler deliver the stock to you or was the pick-up organized by yourself?

☐ stock delivered ______________________

☐ picked-up myself ______________________

☐ both of the above (Please indicate the wholesaler's name beside the above, two responses.)

5. Please describe the quality of the trees, once they arrived. Explain your quality rating in the COMMENTS Section (Page 9).

		WHOLESALER NAME (if more than one)
☐ excellent	______________	______________________
☐ good	______________	______________________
☐ fair	______________	______________________
☐ poor	______________	______________________

6. Did you have to cull (throw out) any of the purchased stock once it arrived?

☐ yes (Go to Q.7)

☐ no (Go to Q.8)

7. Can you estimate the percentage of culled trees and/or the actual number of culls?

		WHOLESALER NAME (if more than one)
Percentage	☐ less than 5%	______________________
	☐ 5 - 10%	______________________
	☐ 10 - 20%	______________________
	☐ 20 - 30%	______________________
	☐ 30 - 50%	______________________
	☐ over 50%	______________________
Number of culls	______________	______________________

8. Based on tree quality and service **will you purchase** Christmas Trees from this/these wholesaler(s) next year? If trees were purchased from more than one wholesaler, please indicate the name beside your responses.

☐ yes ______________________________

☐ no ______________________________

☐ don't know ______________________________

☐ will continue to cut and retail own trees (Go to Q.10)

9. Were any of your **wholesale-purchased trees graded** in any way? If trees were obtained from more than one wholesaler, please indicate the name beside your responses.

☐ yes ______________________________

☐ no ______________________________

☐ don't know ______________________________

10. Do you feel that a **Saskatchewan standardized grading system** for Christmas trees would be of benefit to your retailing business? consumers?

RETAILERS	CONSUMERS	
☐	☐	beneficial
☐	☐	may benefit
☐	☐	no benefit

11. Do you **distribute** smaller quantities of trees to retailers around the Province?

☐ yes (Go to Q.12)

☐ no (Go to Q.14)

12. To which **city/town** and how many trees did you distribute?

TREE SPECIES	CITY TOWN	Nº TREES
B.C. Fir (Kootenays)	________	________
Balsam Fir	________	________
Scots Pine	________	________
Sheared Douglas Fir	________	________
Sask. Wild Spruce	________	________
Sask. Wild Fir	________	________
Blue Spruce	________	________
White Pine	________	________
Other ________	________	________
________	________	________

13. Are these **smaller retailers** regular customers or is this the first year they have purchased trees from you?

☐ most of them regular customers

☐ most of them first-time customers

☐ some of them regular customers

☐ some of them first-time customers

14. Please check off the items that you **retail** at the same time as Christmas trees?

☐ wreaths

☐ boughs

☐ cones

☐ tree stands

☐ tree ornaments

☐ Christmas lights

☐ flowers & plants

☐ treebags

☐ artificial Christmas trees

☐ Other ____________________

☐ Christmas trees only

15. If you sold **artificial Christmas** trees during the Holiday Season, please estimate the number sold and price per tree.

Nº. SOLD	PRICE/TREE
________	________
________	________
________	________
________	________
________	________

16. Do you offer **free gifts** to customers with the purchase of a natural Christmas tree? Please specify the type of gift (i.e. candy canes, discount vouchers, etc.)

☐ yes ________________________

☐ no

17. Do you provide Christmas tree customers with **tree set-up, safety & maintenance information?** If you do, please specify whether this information was provided verbally, or through a special handout (i.e. brochures).

	VERBAL	HANDOUT
☐ Christmas tree set up	☐	☐
☐ Christmas tree safety tips	☐	☐
☐ Christmas tree maintenance information	☐	☐
☐ none of the above		

18. What kind of **promotional techniques/campaigns** do you use for your Christmas tree business?

☐ newspaper/magazine advertising

☐ television advertising

☐ in-door show room

☐ posters

☐ radio

☐ billboard

☐ none of the above (Go to Q.20)

19. Can you estimate the **percentage** of your gross sales spent on the type of advertising listed above?

_________ %

☐ don't know

20. Please **number** the following Christmas tree characteristics according to what you, the **retailer**, look for in a quality tree (**Most important = #1, #2, #3. Least important = 0**).

__________ freshness
__________ fragrance
__________ form
__________ needle retention
__________ colour
__________ height
__________ purchase price from wholesaler
__________ other ________________________

21. From your **experience**, which concern about the **general conditions** of natural trees on the market is most often expressed by the Saskatchewan **consumer** (please check only one)?

☐ freshness

☐ fragrance

☐ form

☐ needle retention

☐ colour

☐ height

☐ price

☐ other ________________________

22. From your **experience**, what **species** do you see the Saskatchewan consumer increasing their **demand** for into the 1990's?

First ________________________________

Second ________________________________

Third ________________________________

23. What **Holiday time period** results in the most Christmas tree sales for your retailing efforts?

- ☐ one month before Christmas
- ☐ 3 weeks before Christmas
- ☐ 2 weeks before Christmas
- ☐ 1 week before Christmas
- ☐ at the last minute

24. What is your estimate of the number of **junior retailers** (those with 2 or less year's experience) in your city/town?

____

25. Can you provide an estimate of the **percent market** share these "juniors" take by retailing natural trees in your city/town?

- ☐ 0 - 5%
- ☐ 5 - 10%
- ☐ 10 - 20%
- ☐ 20 - 30%
- ☐ 30 - 50%
- ☐ more than 50%
- ☐ don't know.

26. Do you consider the **artificial Christmas tree** harmful to your business?

- ☐ very harmful
- ☐ harmful
- ☐ little harm

27. Have you heard, before this Survey, of the **Saskatchewan Christmas Tree Growers Association**?

- ☐ yes
- ☐ no

28. How would you **consider** bulk purchasing of Christmas trees grown by the Saskatchewan Christmas Tree Growers Association ?

☐ completely replace present source, if quality is good

☐ completely replace present source, if price is good

☐ partially replace present source

☐ not consider to replace present source

29. Has this interview

☐ been informative

☐ bothered you

☐ disturbed your time?

COMMENTS:

On behalf of the Saskatchewan Christmas Tree Growers Association, INTERNATIONAL FORESTSEARCH LTD. thanks you for your collaboration.

MERRY CHRISTMAS & HAPPY NEW YEAR!

APPENDIX II

ANALYSIS OF CONSUMER RESPONSES

INTRODUCTION

This Appendix deals strictly with the Consumer respondent data obtained during the telephone surveying period of this Study (January 1989).

It is necessary to separate or group the answers according to which sections of the consumer questionnaire were completed. Appendix I (pages I-12 - I-24) displays this questionnaire. The first page (general information) and the final questions (numbers 33 - 38) are common questions to all household types. The remainder of the questionnaire was only partially answered depending on the household. For example, a household not displaying a tree at all answered the front page and questions 1 - 5 & 33 - 38.

Thus, this Appendix deals with a total of four (4) sections or groups, distinguished according to the answers given on each questionnaire:

A. ALL HOUSEHOLD RESPONSES
B. THE NATURAL TREE HOUSEHOLD
C. THE ARTIFICIAL TREE HOUSEHOLD
D. THE NO-TREE HOUSEHOLD

Each of these sections contains a summary analysis of the responses, gleaning the information thought to be the most important to the SCTGA. Following the analysis, the answers to each question are portrayed graphically so that the SCTGA can review every question and rank according to importance, depending on the readers' personal preference.

A. ALL HOUSEHOLD RESPONSES

Every household willing to respond to the telephone survey has input into the results of this section. Table 4, below, illustrates that 509 consumers responded to the questionnaire, producing a success rate of 82%.

Table 4. CONSUMER TELEPHONE SURVEY COVERAGE

CITY / TOWN / VILLAGE	COVERED POPULATION	CONSUMER *
CITY		
SASKATOON	183,487	82 (16)
REGINA	179,400	93 (13)
MOOSE JAW	35,522	17 (3)
PRINCE ALBERT	34,369	17 (1)
SWIFT CURRENT	16,144	17 (1)
YORKTON	16,121	12 (1)
NORTH BATTLEFORD	14,745	16 (5)
ESTEVAN	10,498	15 (2)
WEYBURN	10,347	15 (5)
LLOYDMINSTER	6,960	14 (7)
MELFORT	6,296	11 (1)
MELVILLE	5,353	11 (1)
KINDERSLEY	5,059	13 (5)
REPRESENTATIVE TOWNS		
MEADOW LAKE	4,188	12 (3)
ASSINIBOIA	2,991	9 (2)
ROSETOWN	2,808	10 (5)
CANORA	2,595	11 (3)
MAPLE CREEK	2,517	11 (2)
WADENA	1,717	9 (2)
GRENFELL	1,267	8 (1)
DAVIDSON	1,232	8 (1)
MAIDSTONE	1,114	10 (1)
LEADER	1,073	10 (2)
REPRESENTATIVE VILLAGES	7,500**	
WATSON		8 (2)
STOUGHTON		8 (0)
ROCKGLEN		7 (2)
FOX VALLEY		8 (3)
EATONIA		8 (3)
KENNASTON		8 (3)
DELISLE		8 (5)
PENSE		8 (4)
PONTEIX		7 (1)
COLEVILLE		8 (4)
TOTALS	**553,303**	**509 (110)**

* ( ): represents number of refusals.
** Estimated average population per village: 750.

Survey results indicated that 80% of Saskatchewan households displayed a Christmas tree during the 1988 Holiday season (see Figure 8, page II-8).

Natural trees were found in 46% of these households, artificial trees in 52%, and 2% of Saskatchewan households displayed both an artificial & natural tree (see Figure 9, page II-9).

SASKATCHEWAN ECOREGIONS

Table 5 summarizes the three (3) Saskatchewan ecoregions according to preferred tree type. The Forest Fringe zone (communities located next to the northern commercial forest), as expected, displayed a majority of natural trees, whereas the Parkland (communities located within areas of cultivated farmland and isolated patches of forest) & Grassland (Prairie land, generally void of trees) zone households displayed a majority of artificial trees.

Table 5. HOUSEHOLDS DISPLAYING CHRISTMAS TREES BY ECOREGIONS

	%					
TREE TYPE	FOREST FRINGE	PARKLAND	GRASSLAND	CITY	TOWN	VILLAGE
NATURAL	46	32	38	34	45	41
ARTIFICIAL	29	44	42	42	41	41
BOTH	2	2	2	1	1	0
NO TREE	23	22	18	23	13	18
TOTALS	100%	100%	100%	100%	100%	100%

Saskatchewan cities displayed a majority of artificial trees and had a larger percentage of no-tree homes, whereas towns & villages tended toward the natural tree or an even natural/artificial split respectively.

SASKATCHEWAN HOUSEHOLDS

Natural trees were found to be in use most often in houses & mobile homes across the Province. The majority of artificial tree-users resided in houses, apartments, duplexes & row houses. Two percent (2%) of houses displayed both an artificial & natural tree, and no other household type was found with this combination. The majority of apartment dwellers were found not to display a Christmas tree. (See Table 6 below).

Table 6. HOUSEHOLD TYPES DISPLAYING CHRISTMAS TREES

	%					
TREE TYPE	HOUSE	APARTMENT	DUPLEX	ROWHOUSE	DOUBLE HOUSE	MOBILE HOME
NATURAL	42	8	22	0	50	67
ARTIFICIAL	42	40	56	100	50	25
BOTH	2	0	0	0	0	0
NONE	14	52	22	0	0	8
TOTALS	100%	100%	100%	100%	100%	100%

Note : Houses make up 78% of respondent data (see Figure 10, page II-10).

FAMILY MEMBERSHIP RELATIONSHIPS

Table 7 lists the type of Christmas tree by family membership type (taken from Figure 11, page II-11). Natural trees were displayed most often in family households with children.

Figure 12 (page II-12) splits up the Family category to illustrate how the majority of families with children under 12 years of age displayed natural trees, while families with children over 12 years of age preferred to display artificial trees.

Singles preferred to display an artificial tree or no tree at all.

Table 7. FAMILY MEMBERSHIP CHRISTMAS TREE PREFERENCES

TREE TYPE	%			
	COUPLES	SINGLE PARENTS	SINGLES	FAMILIES*
NATURAL	45	39	15	50
ARTIFICIAL	44	39	37	41
BOTH	2	0	0	4
NO TREE	9	22	48	5
TOTALS	**100%**	**100%**	**100%**	**100%**

* With children.

TOTAL FAMILY INCOME & AGE OF CHRISTMAS TREE USER

Table 8 shows the type of Christmas tree preferred by Family Income & Age Groups. Generally, natural trees were more frequently displayed by households with family incomes greater than $30,000 and ages of the user greater than 25 years but less than 55 years.

The artificial tree user group can be defined as having incomes less than $30,000 and user age of greater than 55 years.

The no-tree household is one with incomes of less than $20,000 and, generally, greater than 55 years of age.

Table 8. FAMILY INCOME & AGE GROUP CHRISTMAS TREE PREFERENCES

	%										
	TOTAL FAMILY INCOME					AGE GROUP (Years)					
TREE TYPE	<$20,000	$20-30,000	$30-40,000	$40-50,000	>$50,000	18-25	25-35	35-45	45-55	55-65	>65
NATURAL	22	29	29	11	56	40	45	55	42	21	13
ARTIFICIAL	42	45	31	48	37	40	42	37	36	53	48
BOTH	0	3	2	7	0	0	1	1	4	0	0
NO TREE	36	11	14	7	7	20	12	7	18	26	39
TOTALS	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note : Please refer to Figures 13 & 14 (pages II-13 & II-14) for Total Family Income & Age Class of Respondent graphs.

HOLIDAY TRADITIONS

A comparison of natural, artificial and no-tree Holiday customs found in Saskatchewan households is graphically illustrated in Figure 15 (page II-15). Very little difference was evident between natural & artificial tree households. However, no-tree households show a substantial reduction in the practice of all traditional Christmas customs.

CHRISTMAS WREATHS

Figure 16 (page II-16) illustrates that a total of 55% of Saskatchewan households displayed a Christmas wreath in various locations around the home. Out of this number, almost three-quarters (73%) displayed an artificial wreath.

Although many people could not recall how much they paid for their Christmas wreath, artificial wreaths were generally cheaper in price (<$20.00) and more popular for gift-giving, whereas natural wreaths were more expensive (>$20.00) and mainly home-made models.

Figure 17 (page II-17) shows that 74% of houses not displaying a wreath in 1988 have never displayed one in past years. The remainder (26%) of homes which did purchase a wreath in past years preferred artificial (68%) over natural (32%).

CONSUMER SUGGESTIONS FOR THE SASKATCHEWAN CHRISTMAS TREE GROWERS ASSOC.

Over 88% of Saskatchewan residents felt that the SCTGA was a good, to a very good idea. Approximately 10% of respondents weren't certain of the merits of the Association despite interviewers' efforts to generally inform any inquisitive individuals. (See Figure 18, page II-18).

Twenty-nine percent (29%) liked the idea of marketing a Saskatchewan product, 21% would like to see lower prices for natural trees, and 33% of respondents quoted a diverse number of comments that have been categorized and ranked as follows:

1. Ensure a good quality tree.
2. Advertise "Saskatchewan".
3. Offer a competitive price.
4. Provide accessible/readily available lot locations.
5. Ensure a fresh product.
6. Manage the resources carefully.

(See Figures 19 & 20, pages II-19 & II-20, for these statistics).

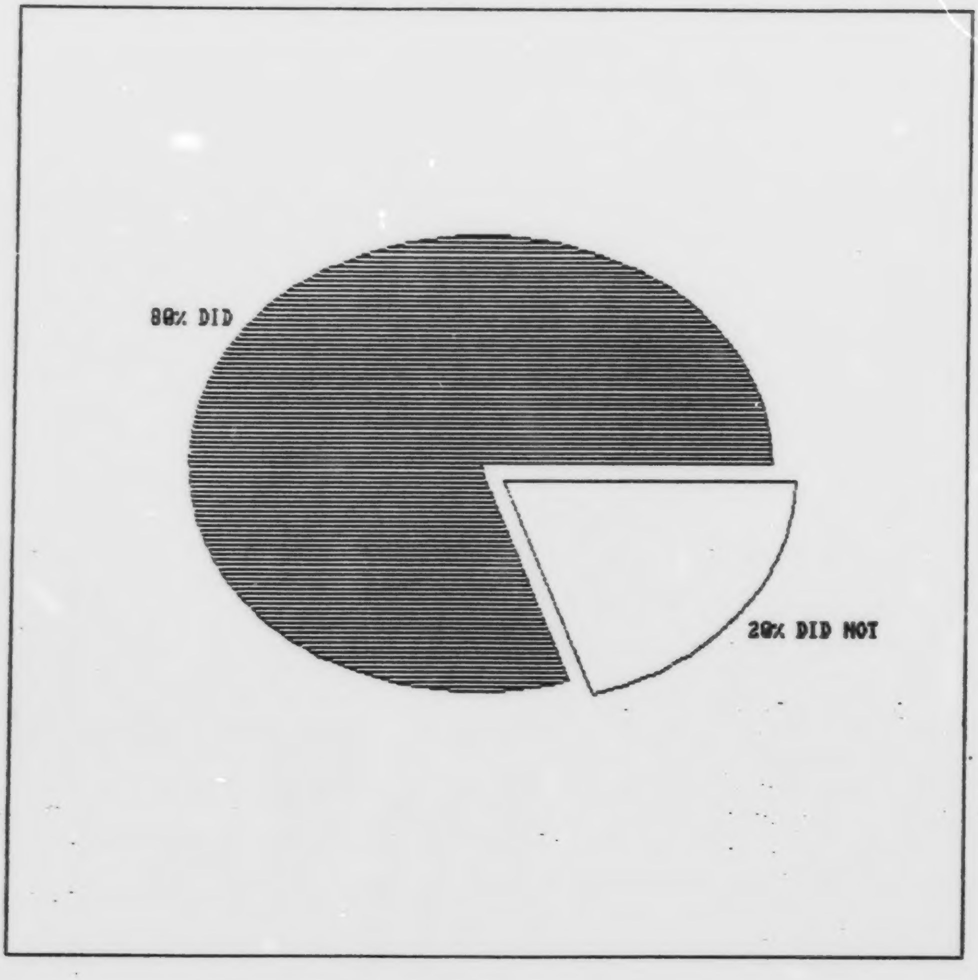


Figure 8. Christmas Tree Display

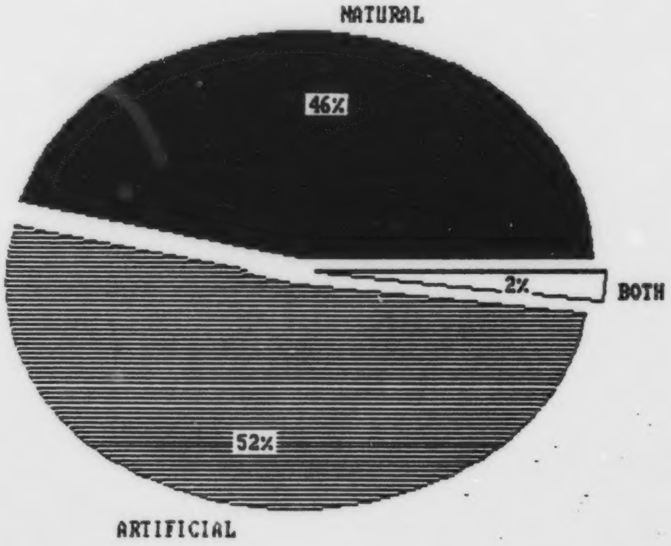


Figure 9. The Type of Tree Displayed

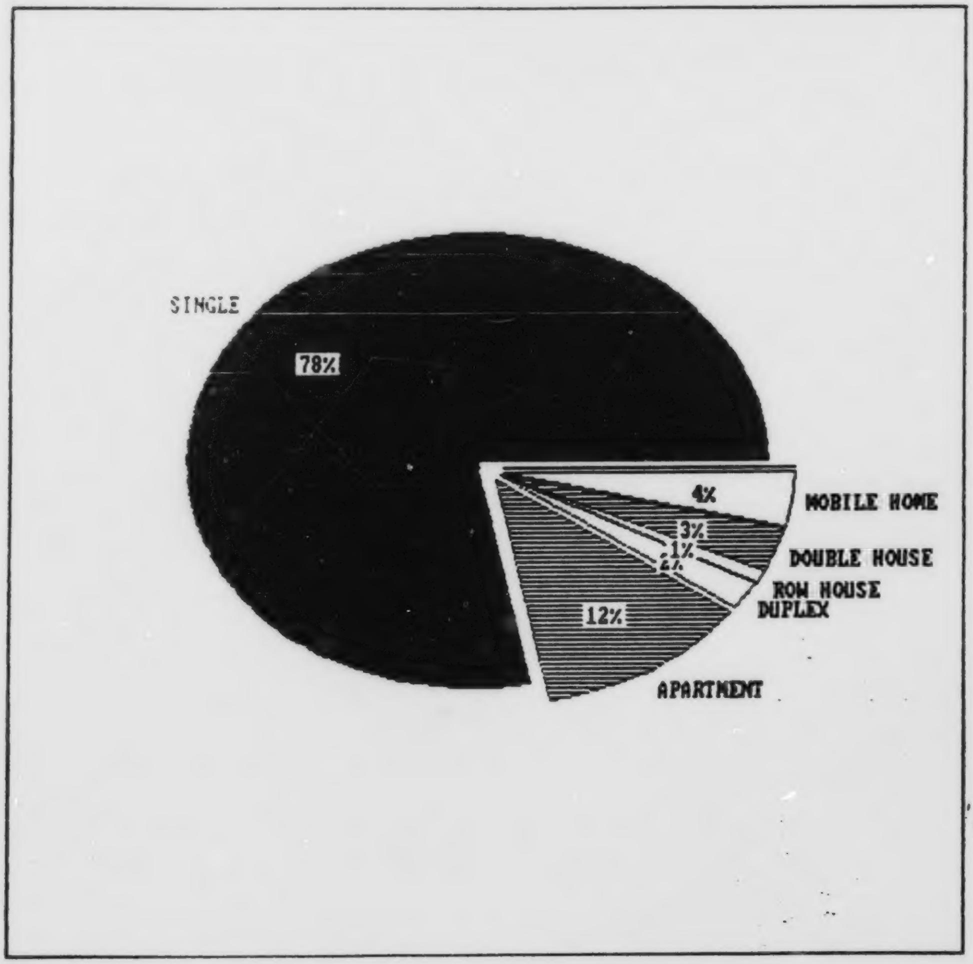


Figure 10. Housing Type

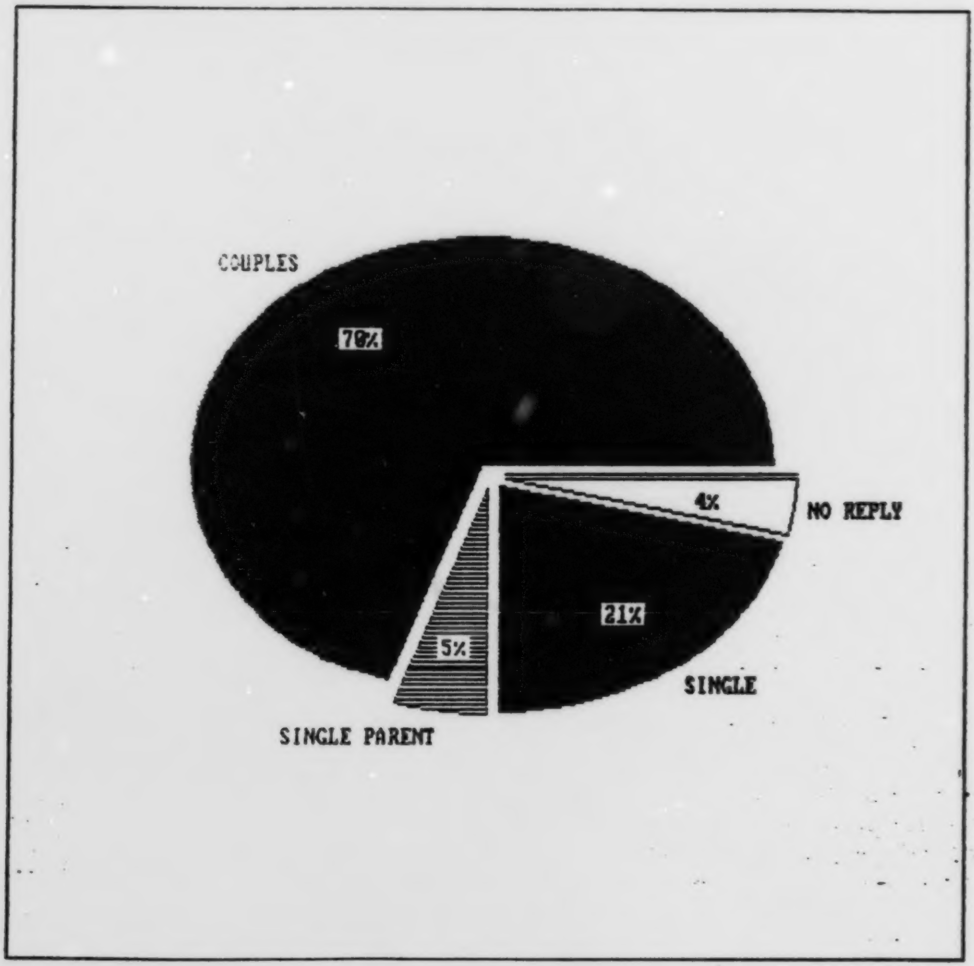
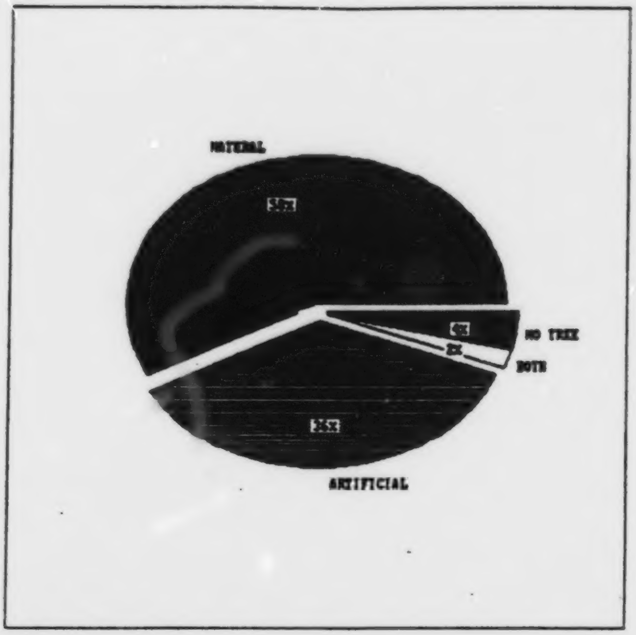
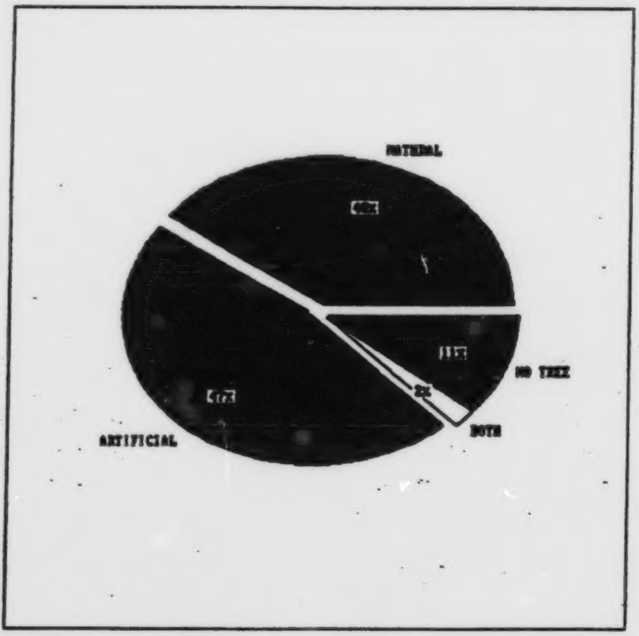


Figure 11. Family Membership



Families with Children under 12 Years of Age



Families with Children over 12 Years of Age

Figure 12. Type of Christmas Tree Displayed by Families with Children

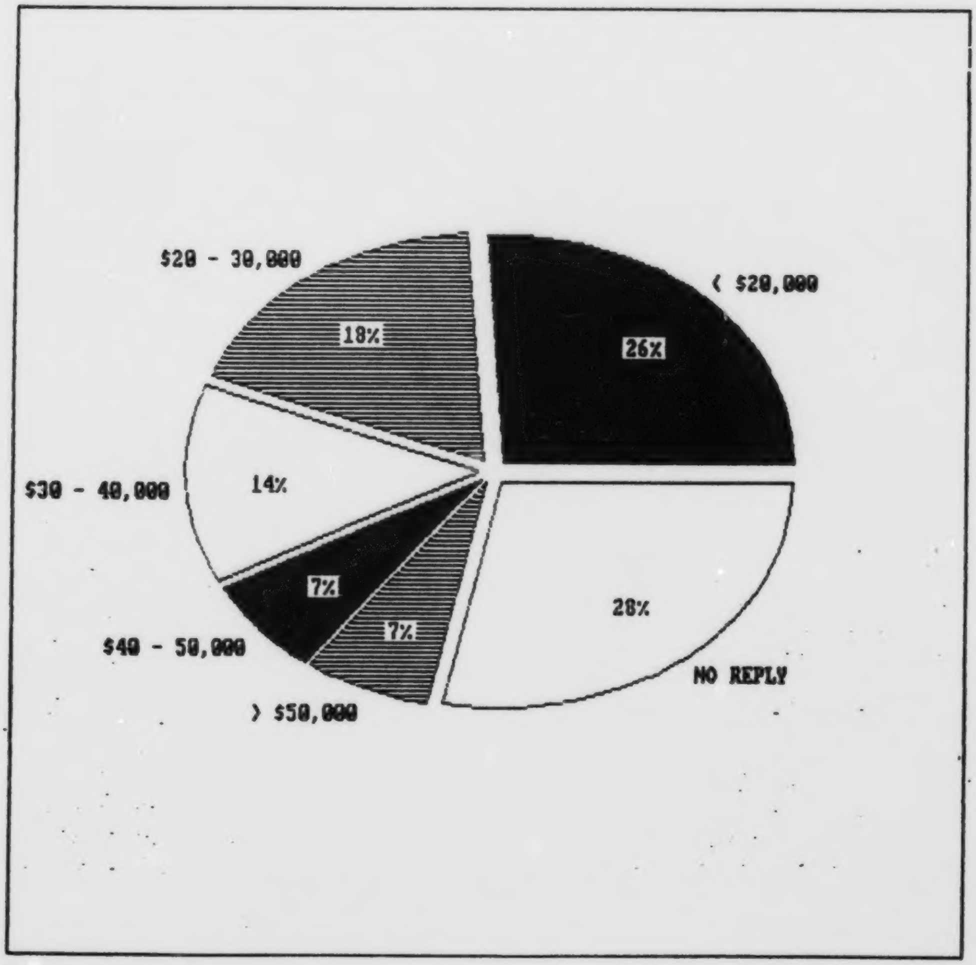


Figure 13. Total Family Income

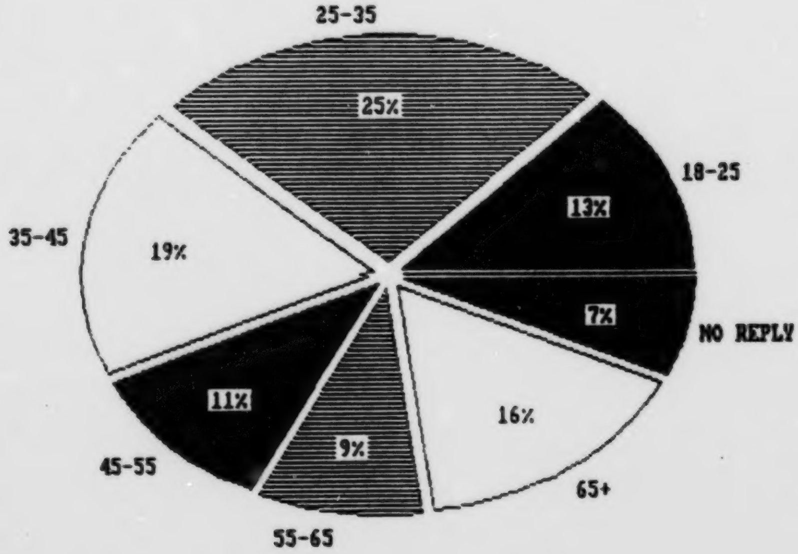


Figure 14. Age Class of Respondent

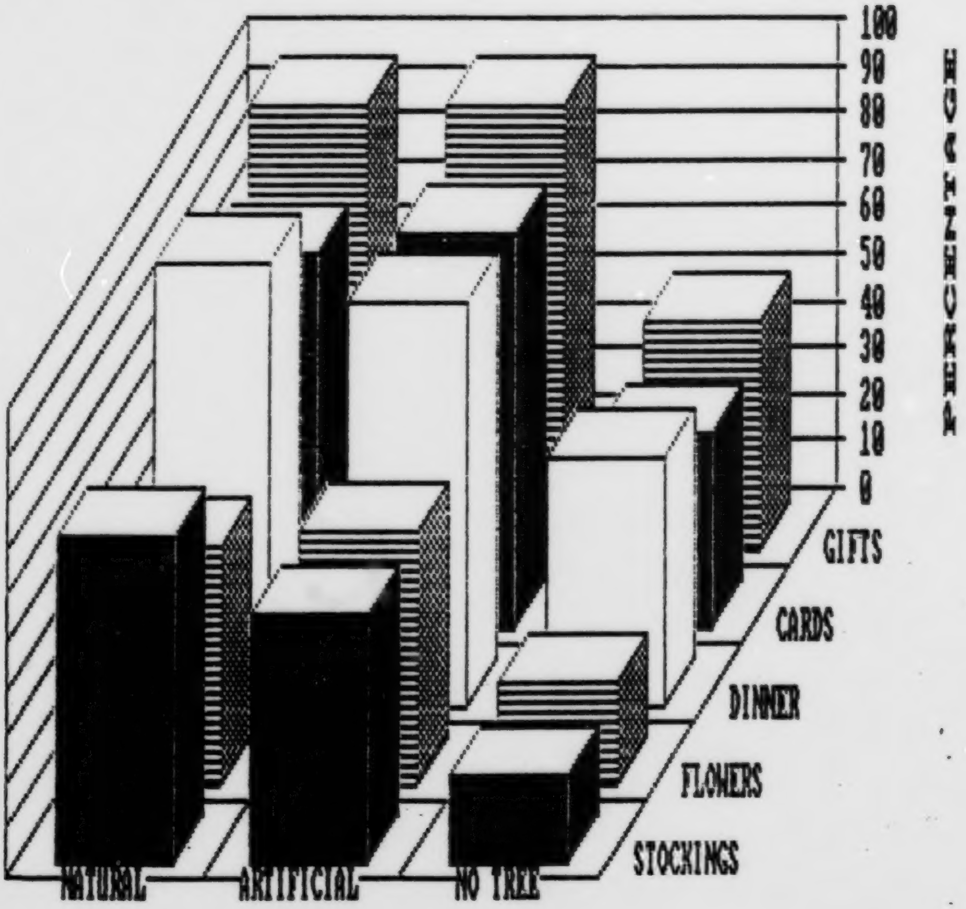
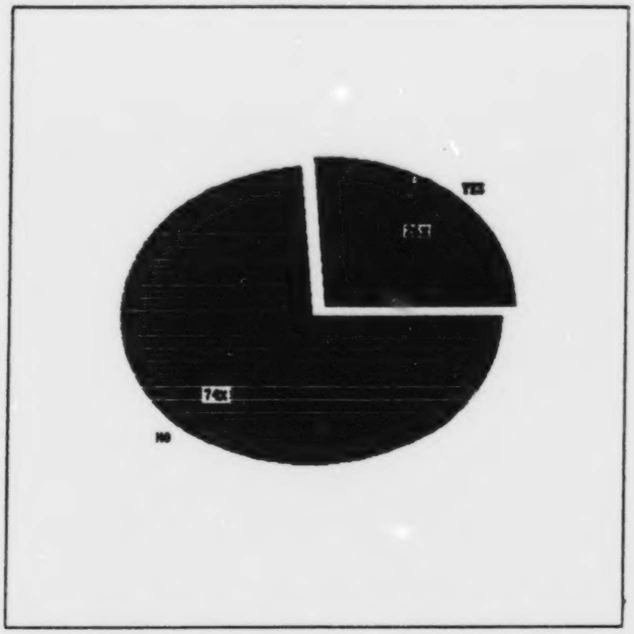
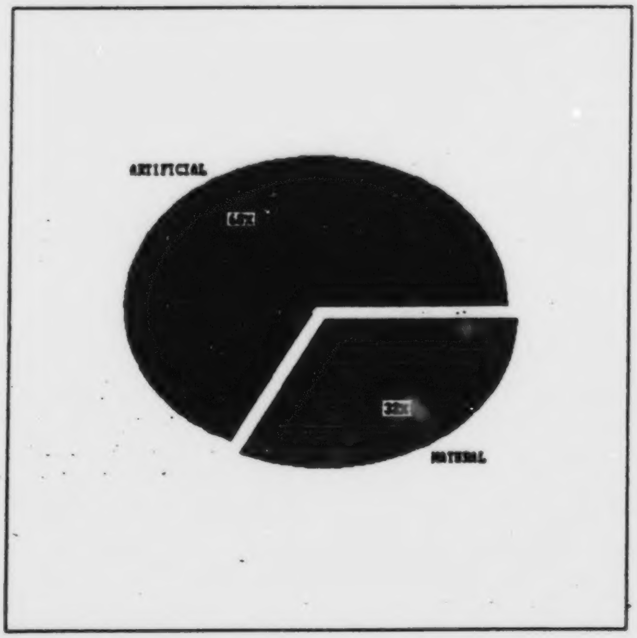


Figure 15. Traditional Customs Celebrated

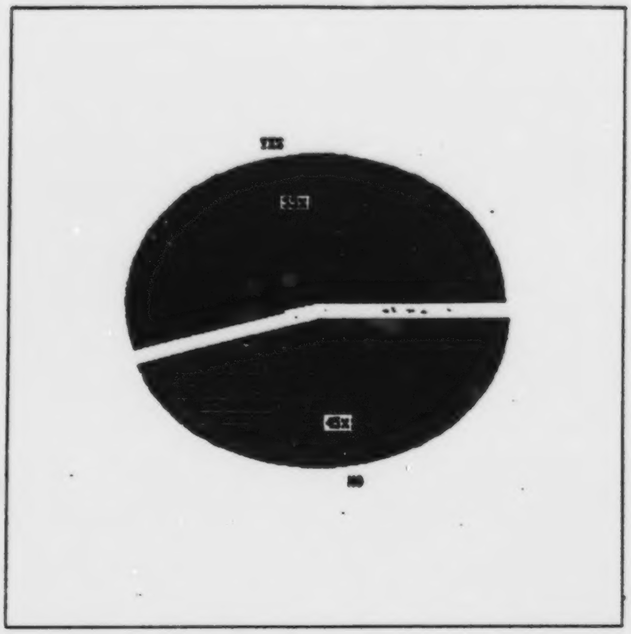


Previous Wreath Purchase

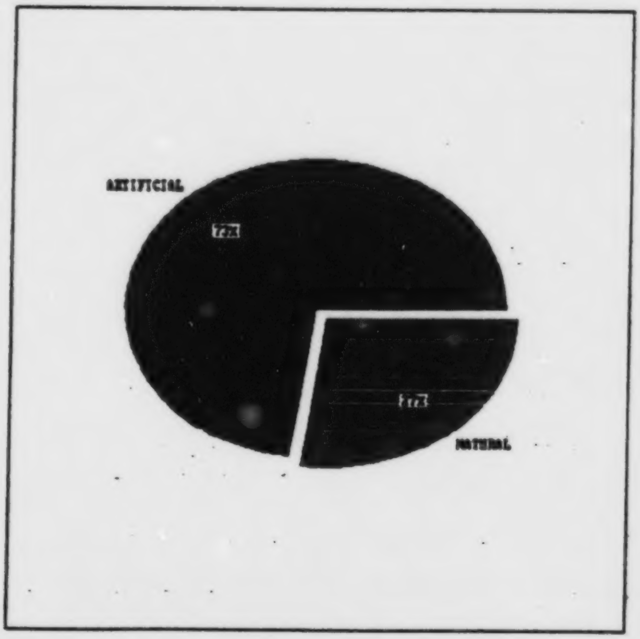


Type of Wreath Purchased in Previous Years

Figure 17. Households Not Displaying a Wreath in 1988



Christmas Wreath Display



Type of Wreath Displayed

Figure 16. Households Displaying Christmas Wreaths, by Type, in 1988

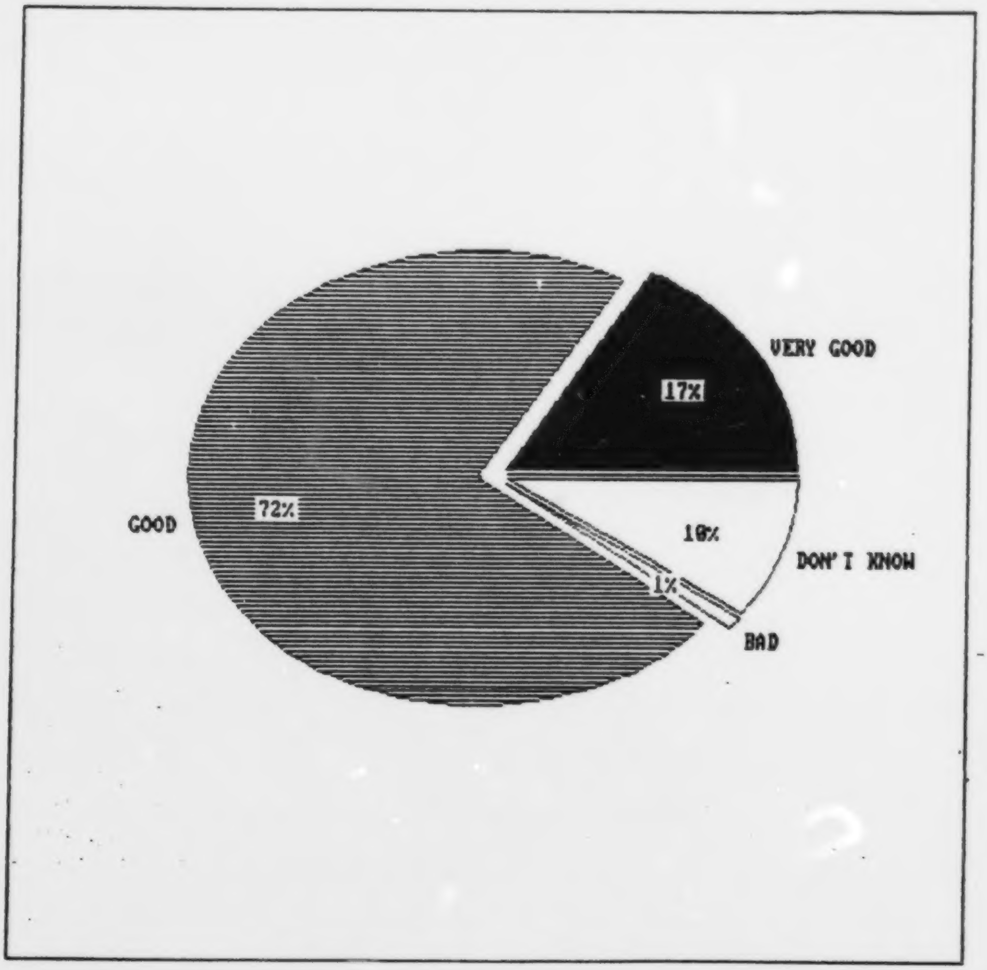


Figure 18. Comments on the SCTGA

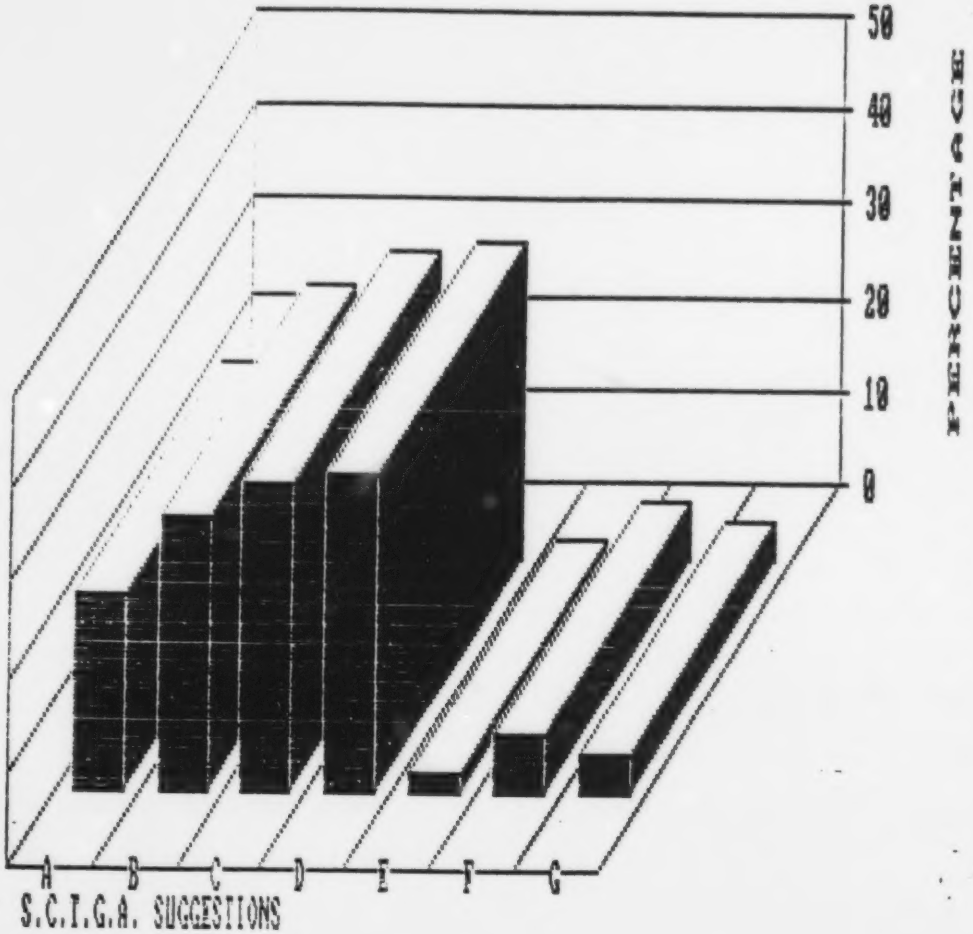


Figure 19. Consumer Suggestions on the SCTGA Promotion

LEGEND

A : Lower Price
B : Saskatchewan Product
C : Miscellaneous (see Figure 20, page II-20)
D : No Idea
E : Provide Better Service
F : General Information
G : Tree Care Information

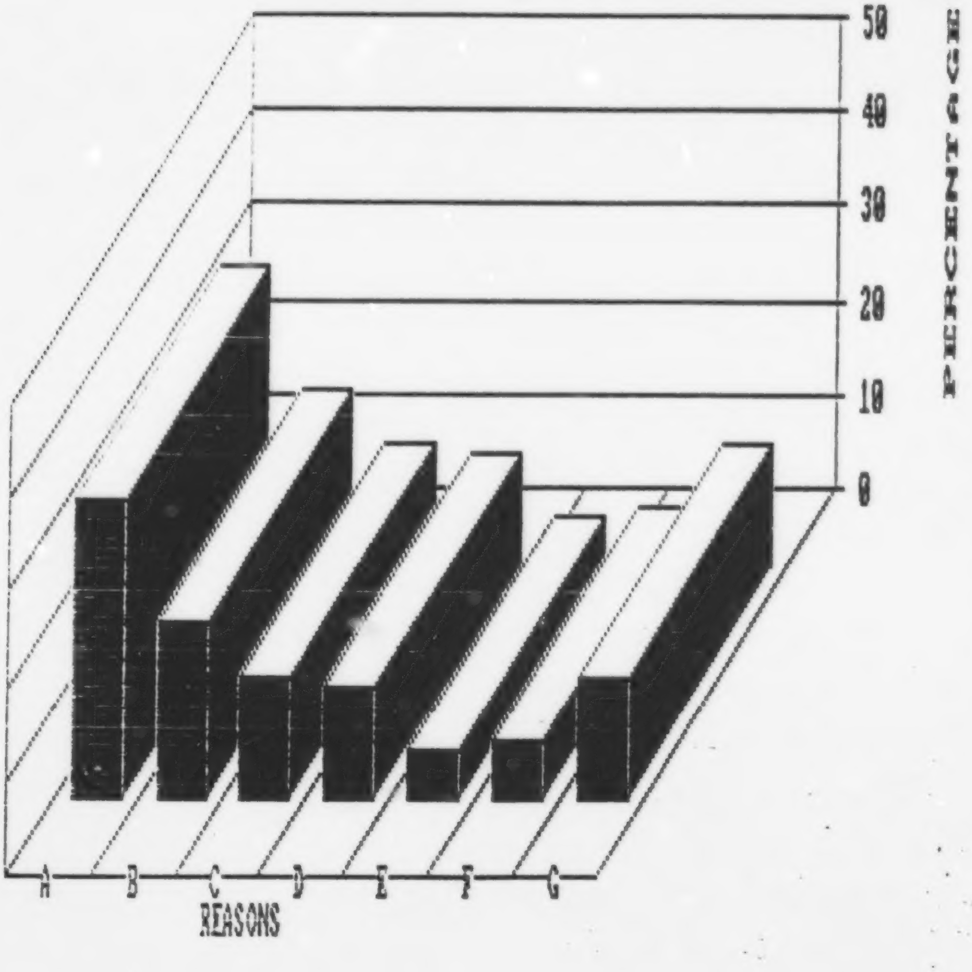


Figure 20. **Miscellaneous Suggestions**

LEGEND

A : Quality Trees
B : Advertise SCTGA
C : Competitive Prices
D : Availability/Accessibility
E : Manage the Resources
F : Fresh Product
G : Diverse

B. THE NATURAL TREE HOUSEHOLD

This section deals strictly with the natural tree household. Appendix II, Section A (ALL HOUSEHOLD RESPONSES), shows that 46% of Saskatchewan households displaying a Christmas tree, preferred to display a natural tree.

Therefore, to find out more about these natural tree households, specific questions were asked of them to determine certain characteristics and possible trend information.

An analysis of important answers to the questionnaire precedes a full graphical presentation of each question. Some answers, labelled miscellaneous or other, were grouped & displayed in a graph immediately following the original question so that important trend information can be obtained.

To review statistics for a natural tree household profile by ecoregion, type of home, family membership, income and age group (all common answers), refer to Section A, pages II-3 - II-6, of this Appendix.

A large majority (45%) of natural Christmas trees are purchased every year by the family husband (see Figure 21, page II-25). Family outings were generally less important when purchasing a tree. However, when the trees were actually cut and not purchased by a household, the family played a large role in the outdoor "feeling" or event.

Figure 22, page II-26 , displays the reasons for choosing natural trees, including:

- preferred a real tree (37%);
- fragrance (26%); and
- tradition (20%).

These reasons became less important when considering the tree characteristics preferred by purchasers. Figure 23, page II-27, compares these reasons and the common identifying characteristics which purchasers looked for when selecting a tree. Seventy-five (75%) of 'other' answers were concerned with tree height, while the remainder was a diverse number of individual characteristics that could not be grouped.

SOURCE OF THE NATURAL TREE

The majority of natural tree households (37%) rely on temporary, commercial lots (independent retailers) for their tree purchasing locations and are not familiar with how many years these lots have been operating (see Figures 24 & 25, pages II-28 & II-29). The second most common source of natural trees was from charitable organizations, such as the Kinsmen Club. Natural trees cut in Provincial forests made up 17% of the sources, most noticeably in the Forest Fringe zone communities, but also found in farming & rural areas throughout Saskatchewan.

Eighty-one percent (81%) of natural tree households purchased their tree at the first lot they shopped in and only 19% shopped in more than one (1) Christmas tree lot (see Figure 26, page II-30).

Consumers of natural trees seem to prefer shopping for their tree two (2) weeks before Christmas, followed by three (3) weeks (25%), and one (1) week (23%) (see Figure 27, page II-31).

CONSUMER SATISFACTION WITH, & PRICE OF, THE PURCHASED NATURAL TREE

Common prices paid for natural trees are found in the range of $10-29.00 per tree (60%). Fourteen percent (14%) of consumers were willing to pay more than $30.00 for a Christmas tree, while 8% paid less than $10.00 (see Figure 28, page II-32).

However, there was very little relationship found when comparing total family income to natural tree price. The majority of all income groups were found to purchase trees within the $10-29.00 price range. However, only income groups >$30,000 were willing to purchase trees at a cost of more than $30.00 per tree.

Ninety-four percent (94%) of natural tree consumers were satisfied with the tree they had purchased (see Figure 29, page II-33). Figure 30, page II-34, illustrates typical, common reasons for consumer dissatisfaction. Seventy-eight percent (78%) of respondents quoted a diverse assortment of 'other' answers, which included:

- crooked trunk;
- uneven branches; and
- tree was bundled up.

CONSUMER AWARENESS: TREE SPECIES IDENTIFICATION

Figure 31, page II-35, shows that the majority (65%) of householders recognized the tree species they had displayed in their homes. Pine was the most common species (45%), followed by equal percentages of spruce & fir (28%). Caution must be exercised when considering these figures; no sure determination was made by the interviewer as to whether the correct species identification was made by the householder.

Figure 32, page II-36, illustrates that most (61%) of Saskatchewan households had no idea where their tree originated from. Twenty-two percent (22%) stated that their tree did come from Saskatchewan. However, it is important to refer back to Figure 24 (page II-28), to see that 17% of respondents cut their own tree, therefore quoting Saskatchewan as the origin of their tree.

Thus, approximately 5% of consumers purchased a Saskatchewan-grown tree.

SAFETY

Figure 33, page II-37, compares householders' feelings towards natural tree safety, and their actual tree watering habits. Although over 50% of householders quoted natural trees as 'less safe but with proper care, no problems', 43% of householders watered their tree only once or twice per week, or less.

NATURAL TREE LOYALTY

Survey results show that approximately 81% of natural tree households have always & only displayed natural trees or have tried artificial trees only once. Although only 2% of Saskatchewan residents displayed both an artificial & natural tree in 1988, 13% of natural tree households own an artificial tree, where the majority (53%) display their artificial tree 'only one and awhile'. (See Figure 34, page II-38).

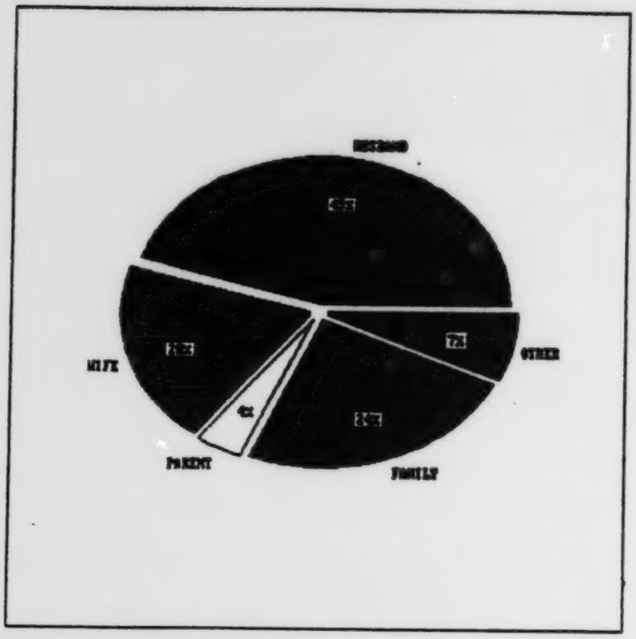
There were no common reasons why the 6% of natural tree households switched from artificial to natural trees during the 1988 Holiday season.

DIVERSE

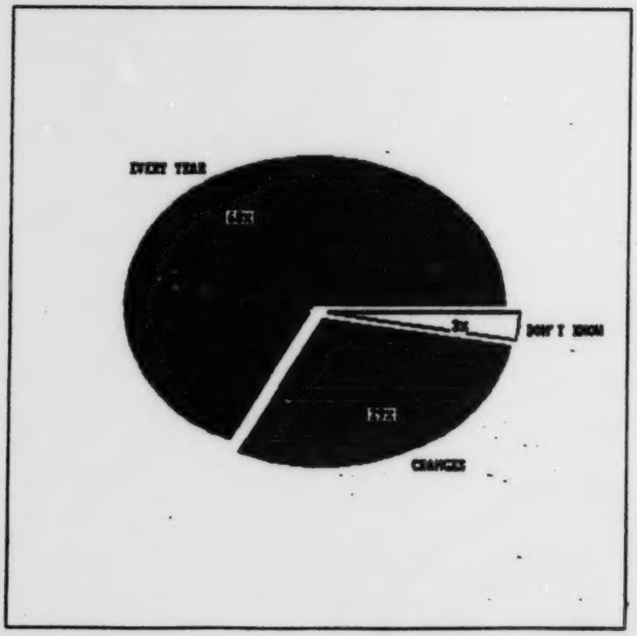
Figure 35, page II-39, illustrates the common natural tree disposal methods across Saskatchewan. The regular garbage pick-up was most frequently used (31%) by households. Twenty-nine percent (29%) of households quoted 'other' comments, from households that either still had their tree up in their home or had placed the tree in their yard.

Figure 36, page II-40, points out that almost one-half (48%) of natural tree households feel that they would consider the possibility of purchasing a small tree for their children.

Figure 37, page II-41, illustrates that 10% of natural tree households have displayed two (2) natural trees in their homes at least once in the past.



Household Purchaser



Same/Different Purchaser Each Year

Figure 21. Household Purchaser in 1988 & in Past Years

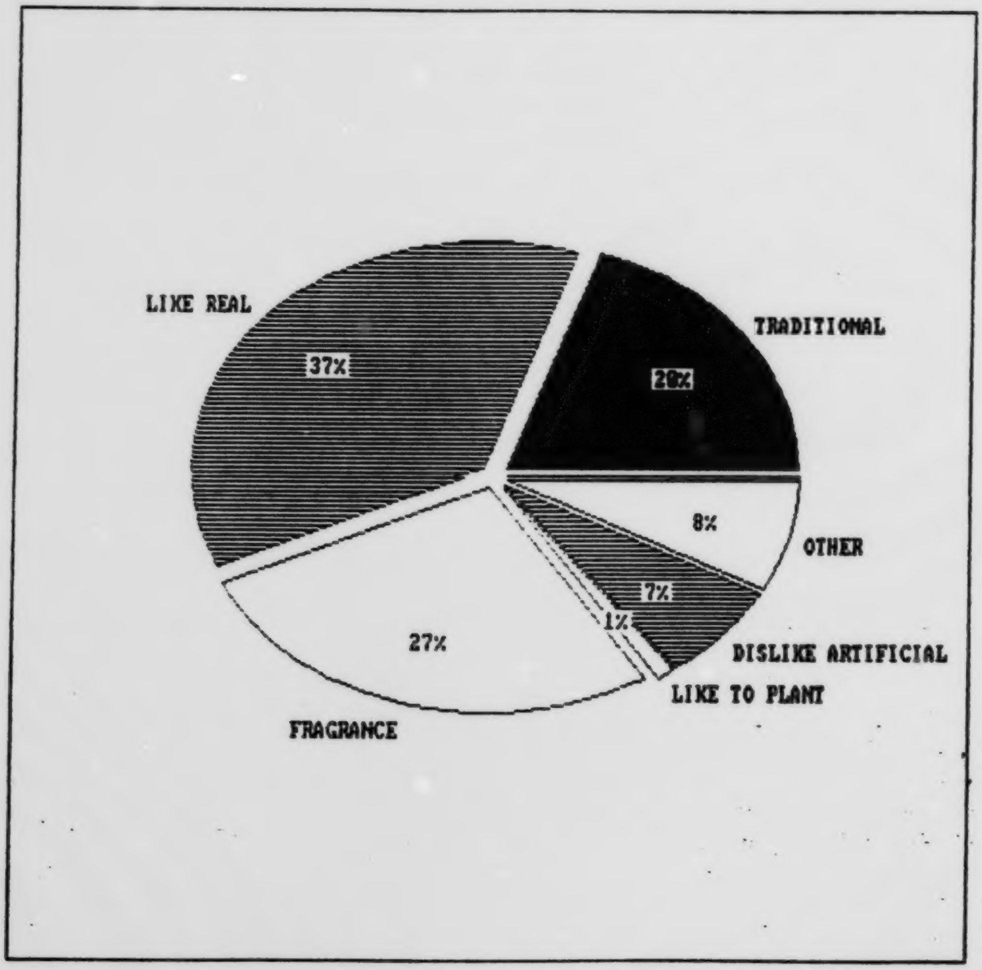


Figure 22. Reasons for Choosing a Natural Tree

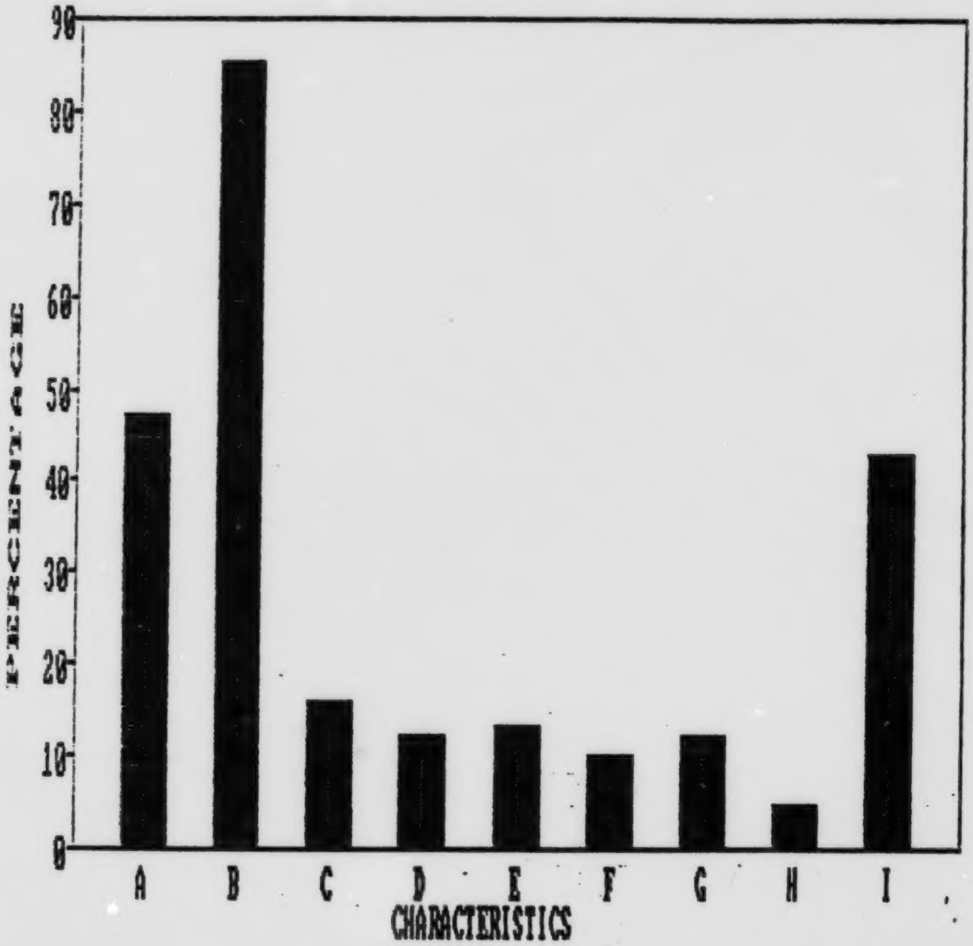


Figure 23. Common Tree Characteristics Preferred by Purchaser

LEGEND

A : Shape
B : Fullness
C : Freshness
D : Straight Trunk
E : Species
F : Price
G : Colour
H : Fragrance
I : Other

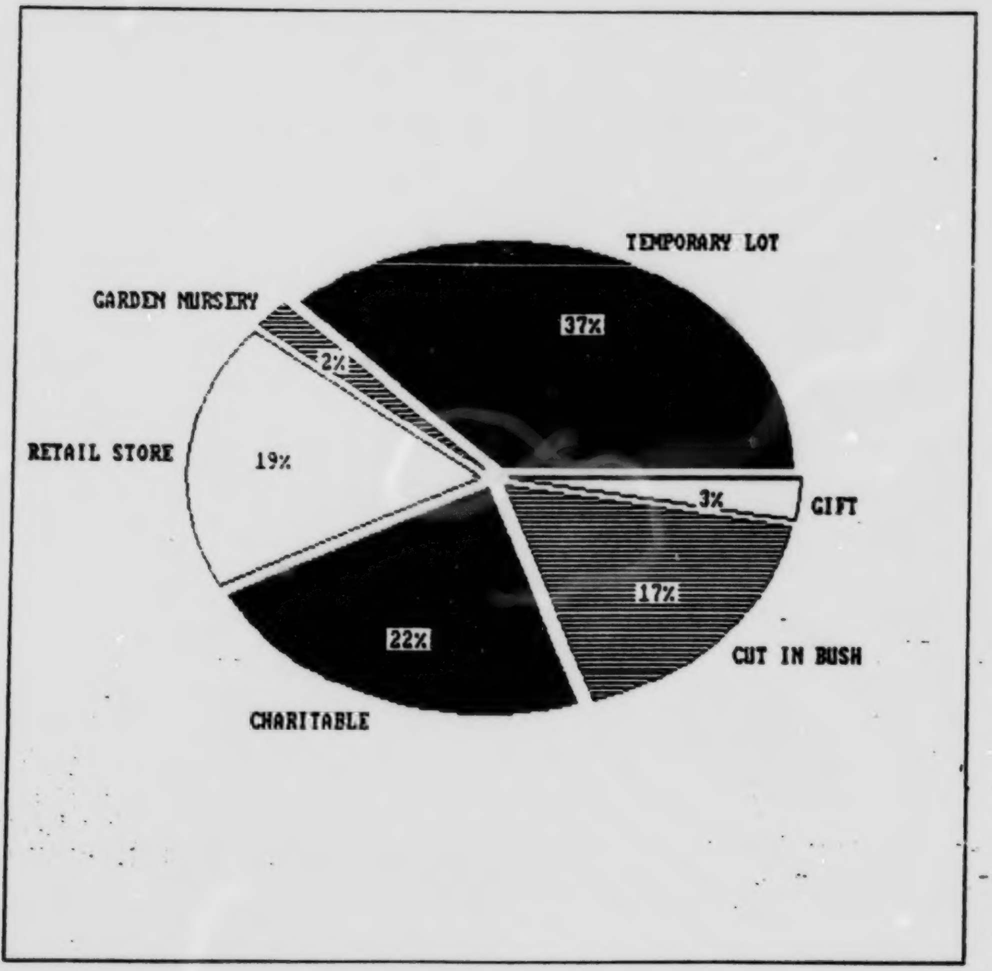


Figure 24. Source of Tree

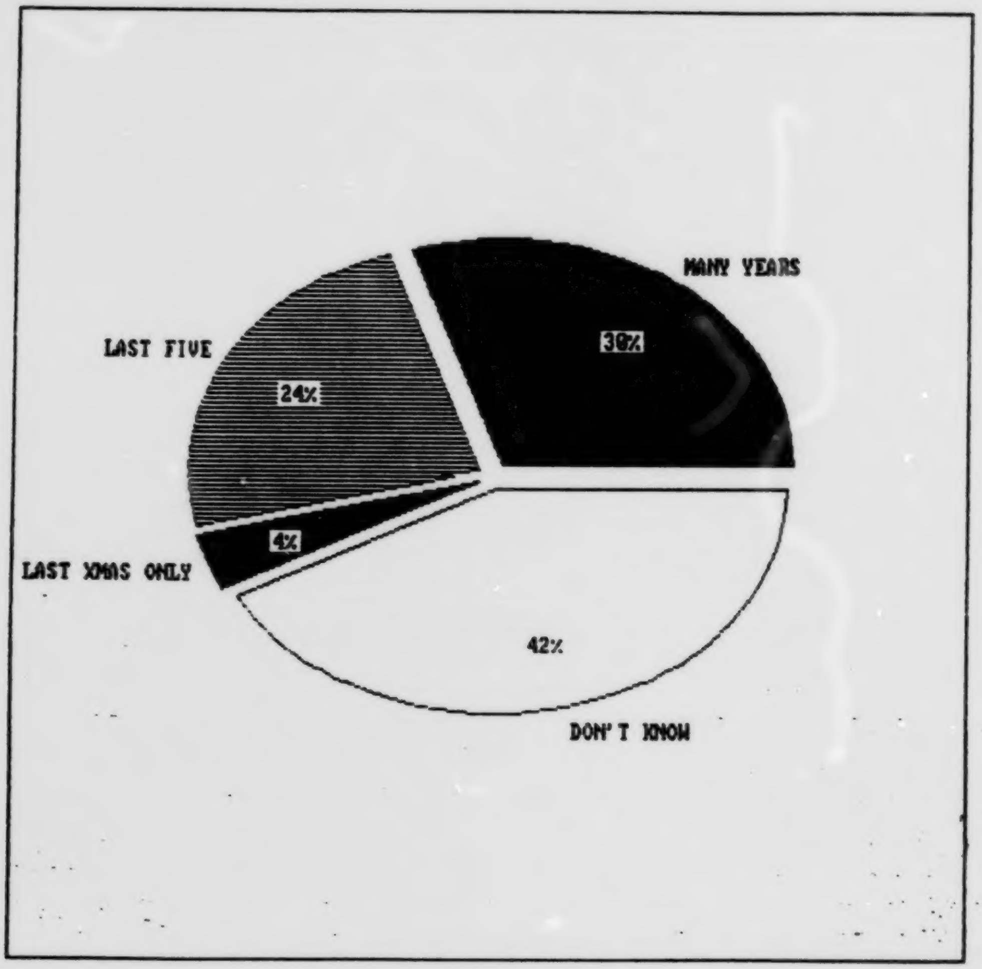


Figure 25. Length of Time Temporary Lot has been Operating

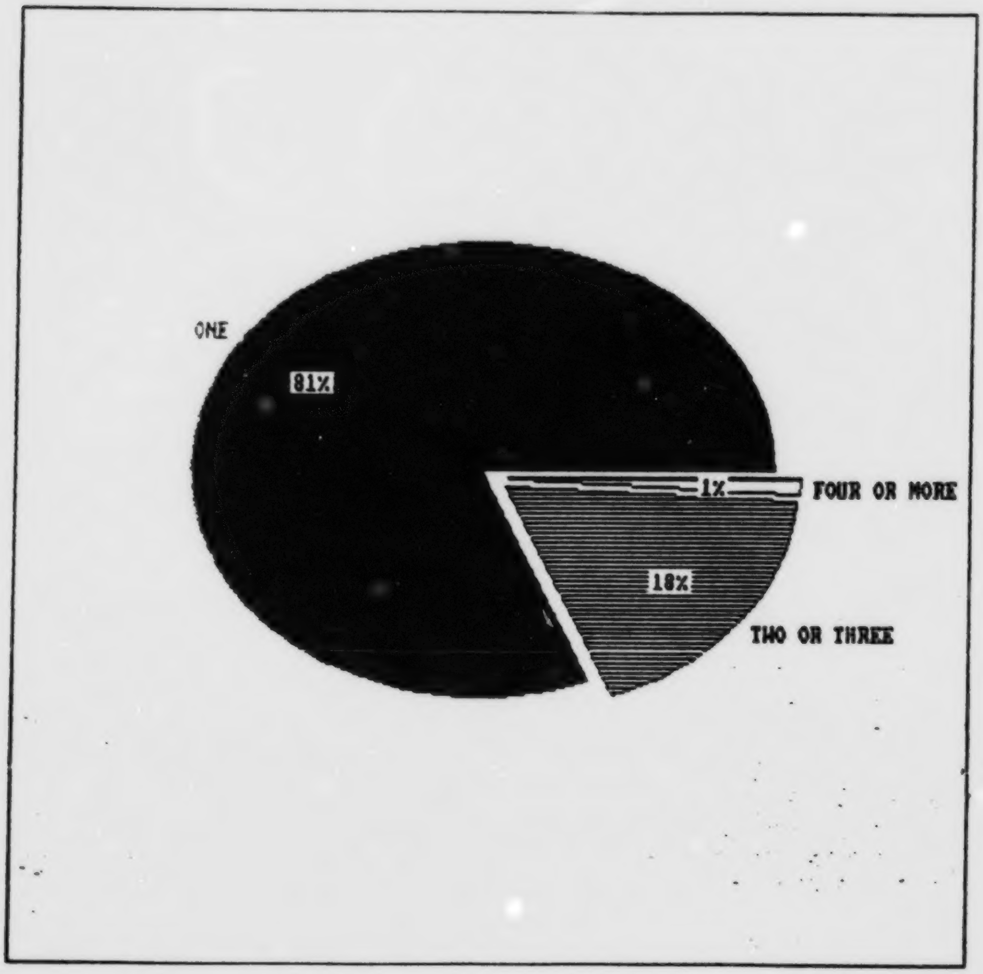


Figure 26. Number of Locations Shopped to Buy a Tree

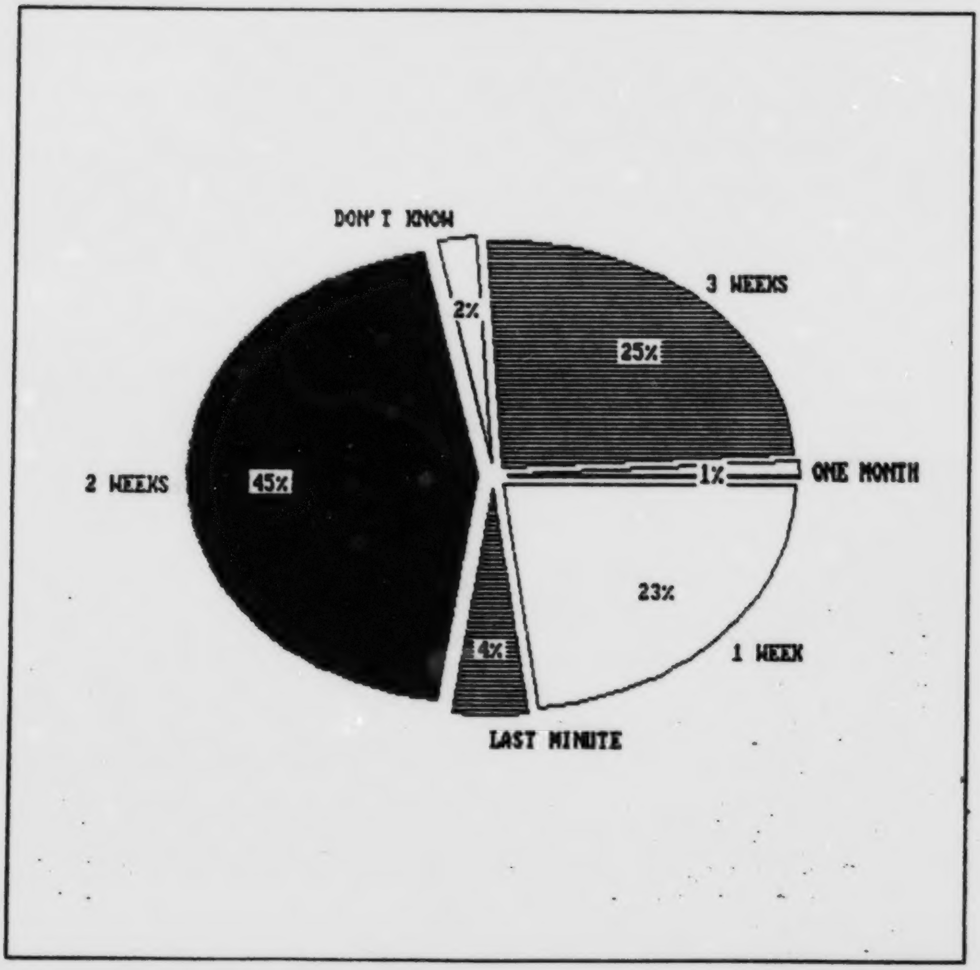


Figure 27. Time of Tree Purchase Before Christmas

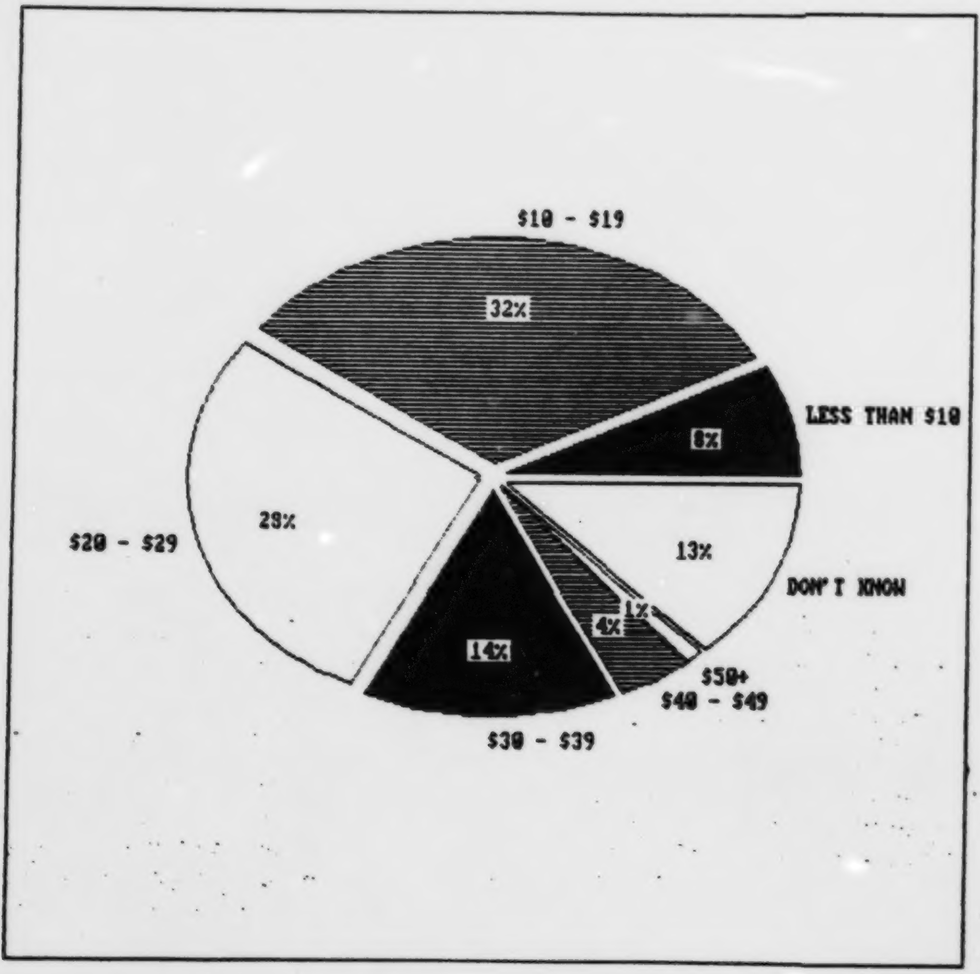


Figure 28. Price of Tree

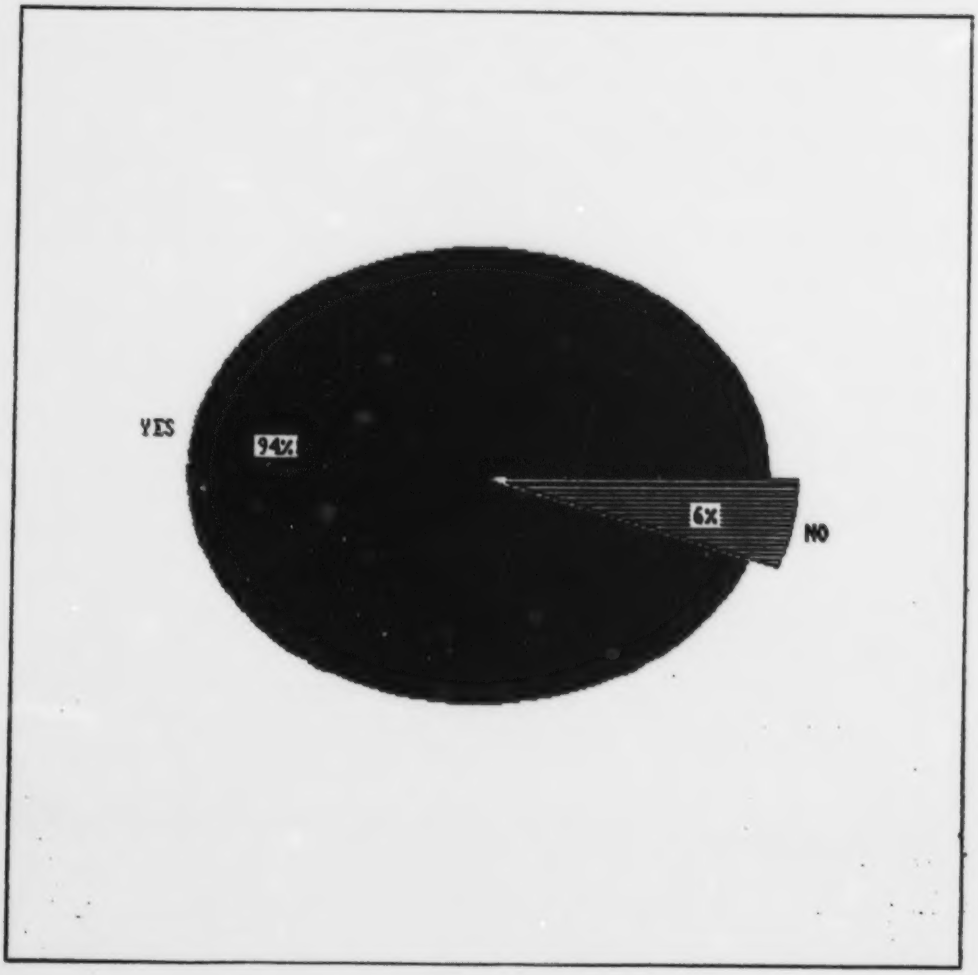


Figure 29. Consumer Satisfaction with Natural Tree

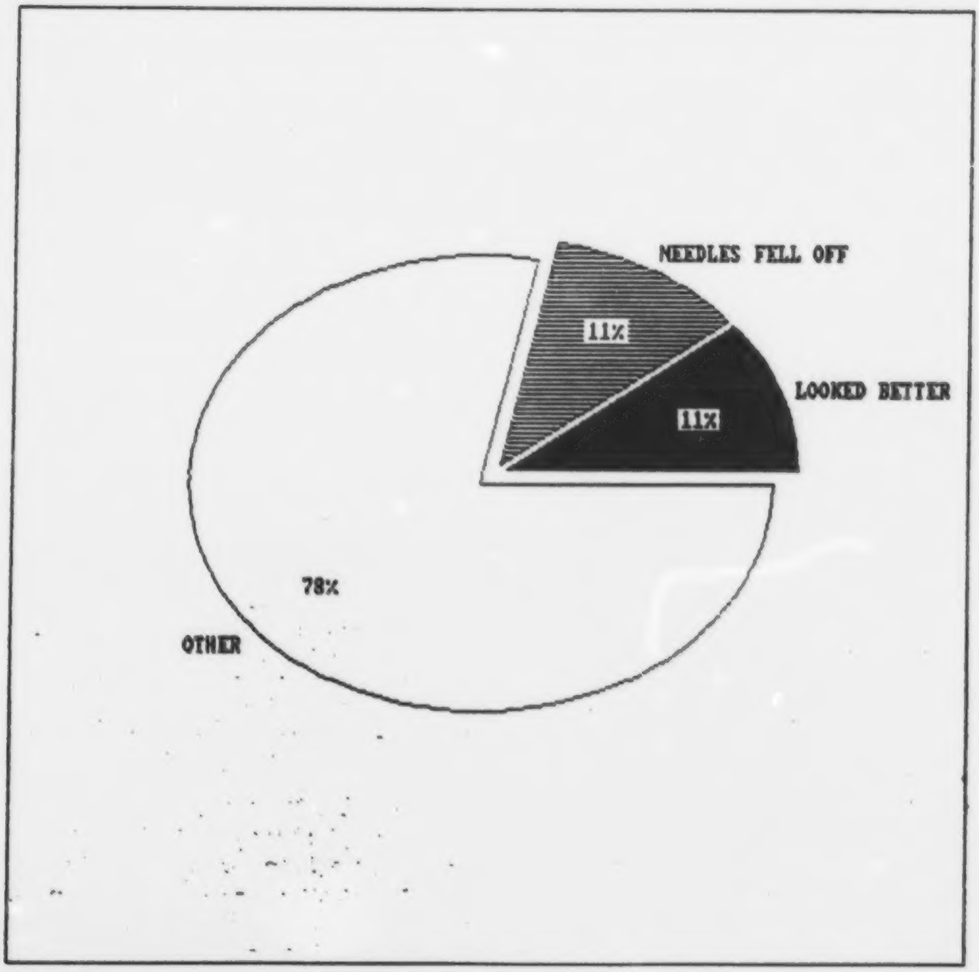
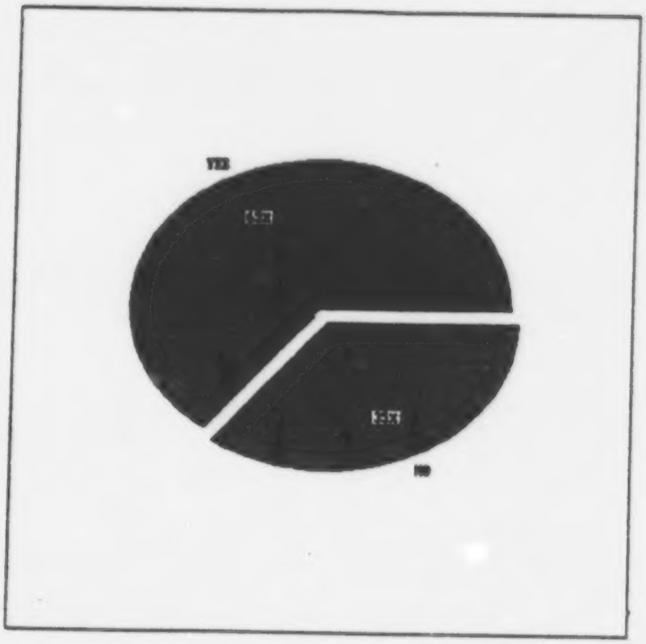
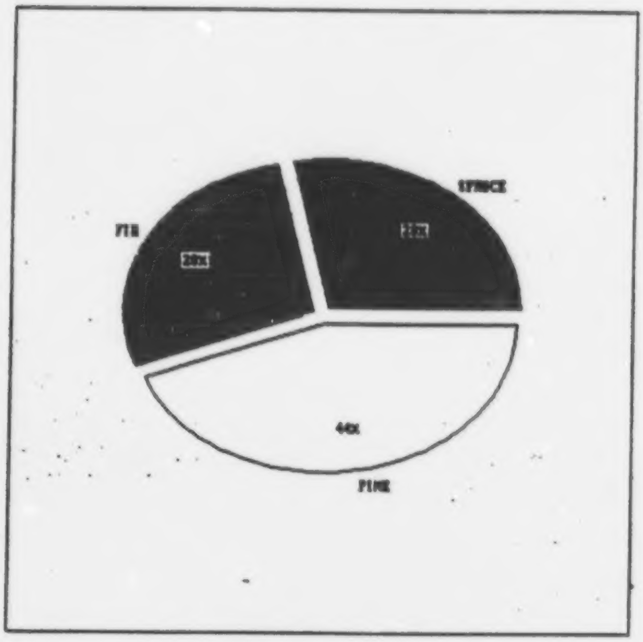


Figure 30. Reasons for Non-Satisfaction



Consumer Recognition of Tree Species



Tree Species Displayed

Figure 31. Consumer Recognition & Frequency of Natural Tree Type

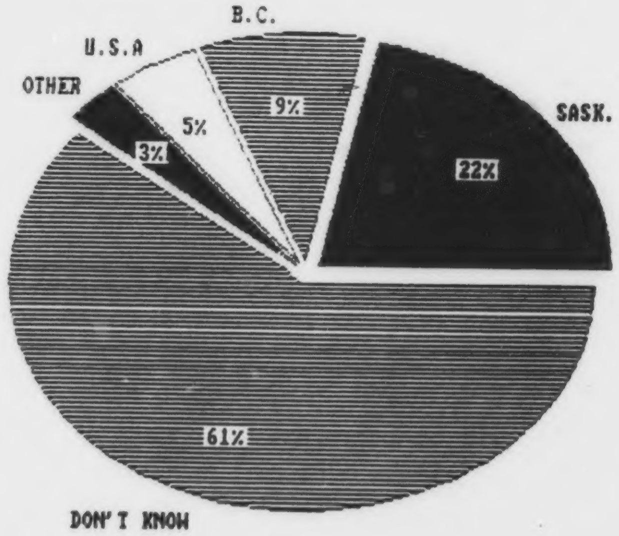
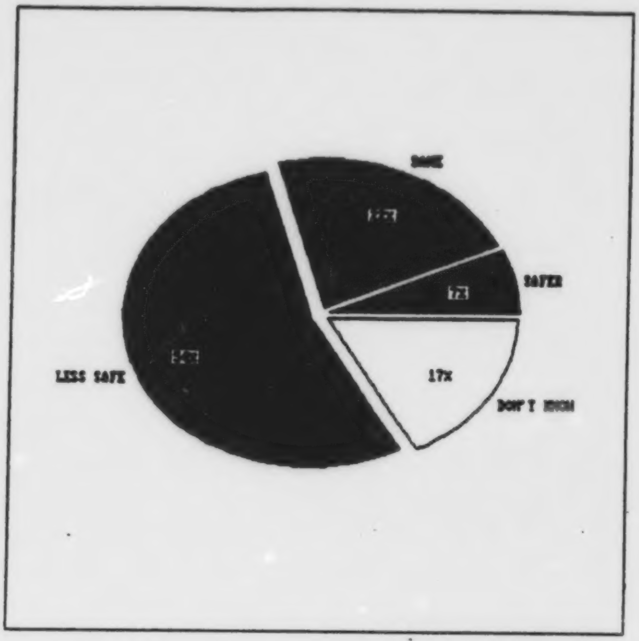
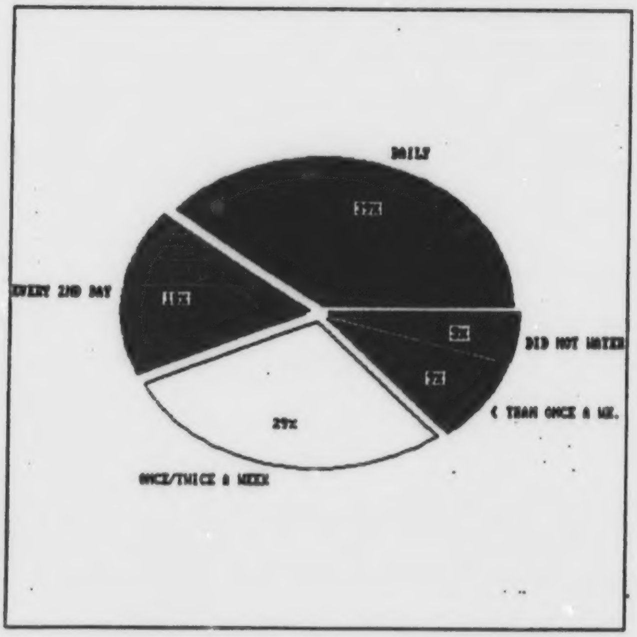


Figure 32. Origin of Tree

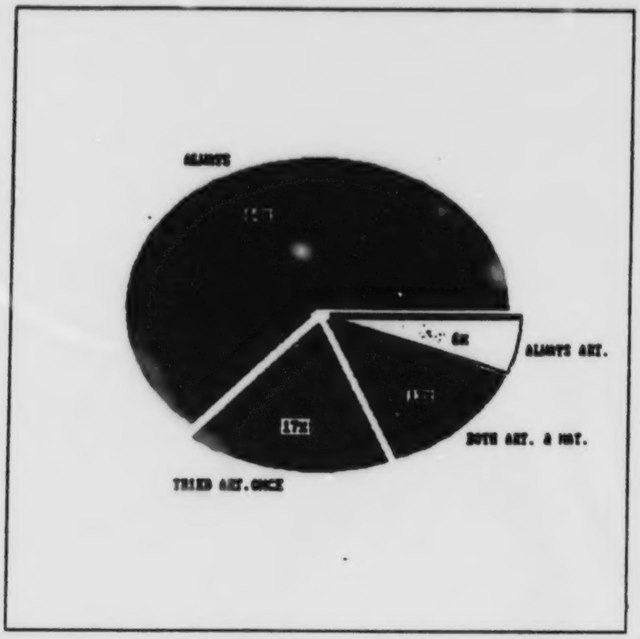


Natural vs. Artificial Tree Safety

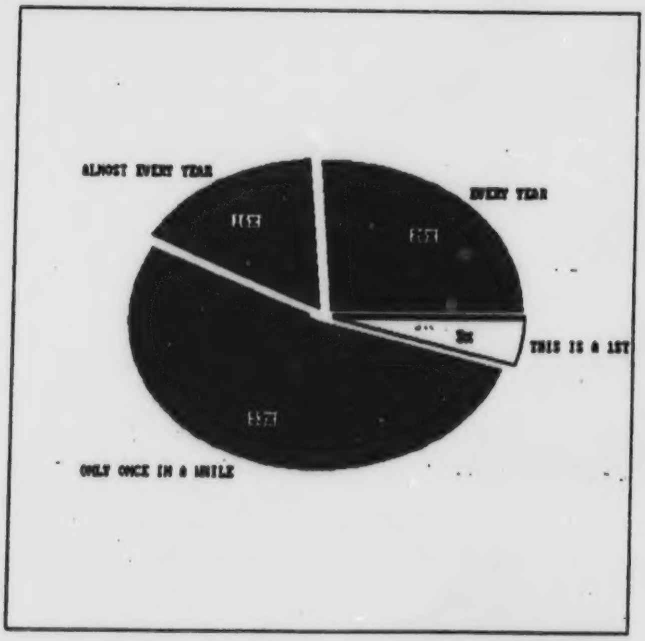


Tree Watering Habits

Figure 33. Natural vs. Artificial Tree Safety & Tree Watering Habits



Natural Tree Loyalty



Frequency of Artificial Tree Display

Figure 34. Natural Tree Loyalty & Frequency of Artificial Tree Display

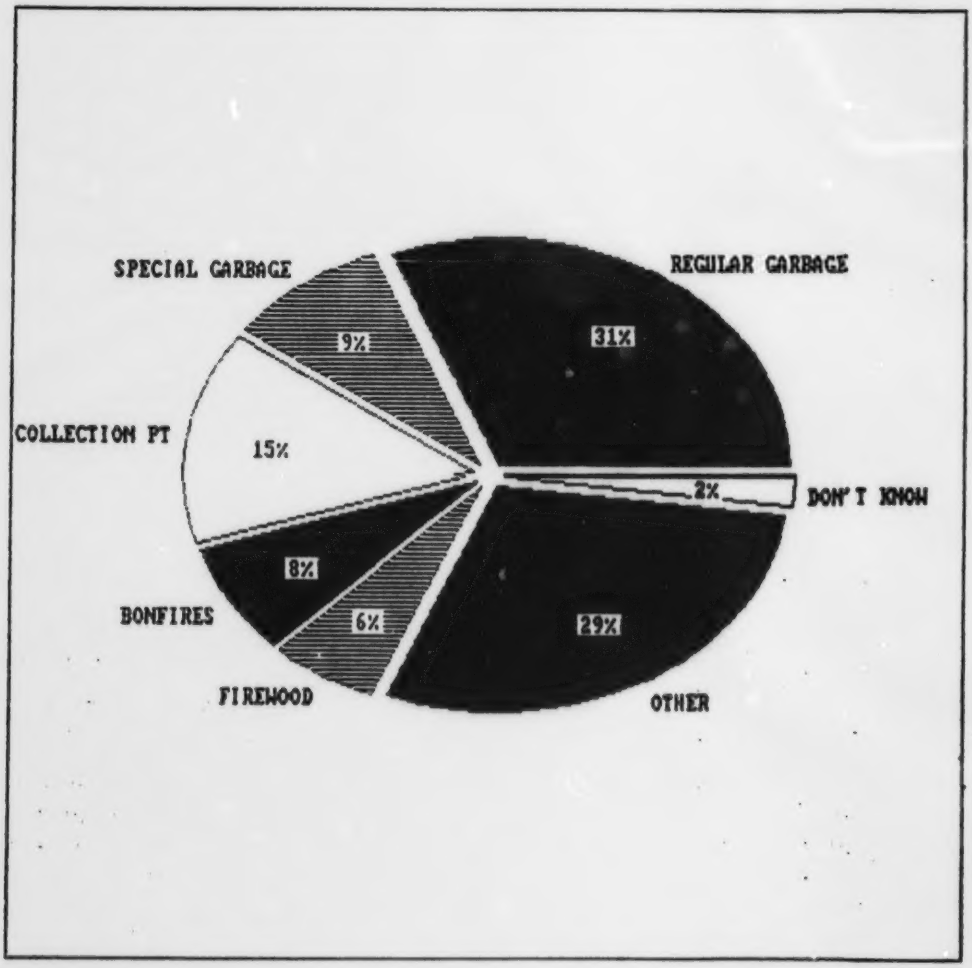


Figure 35. Disposal Method

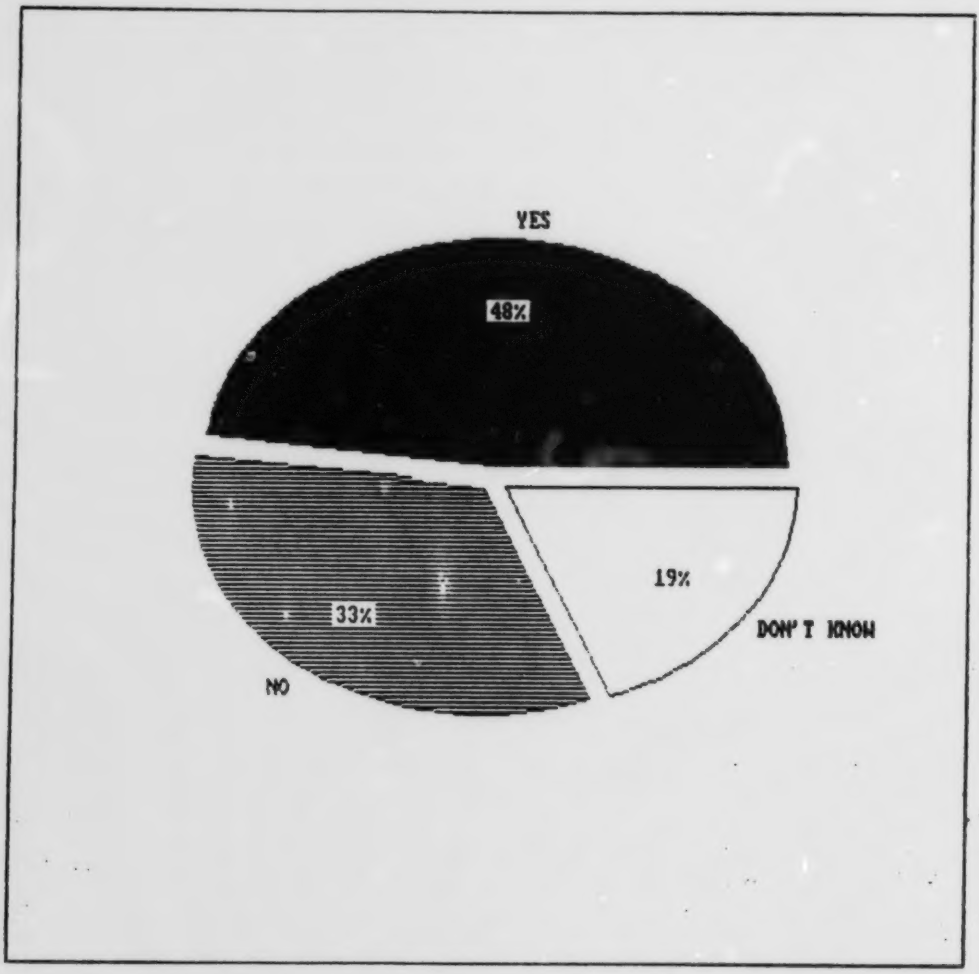


Figure 36. Possibility of Children Enjoying Their Own Tree

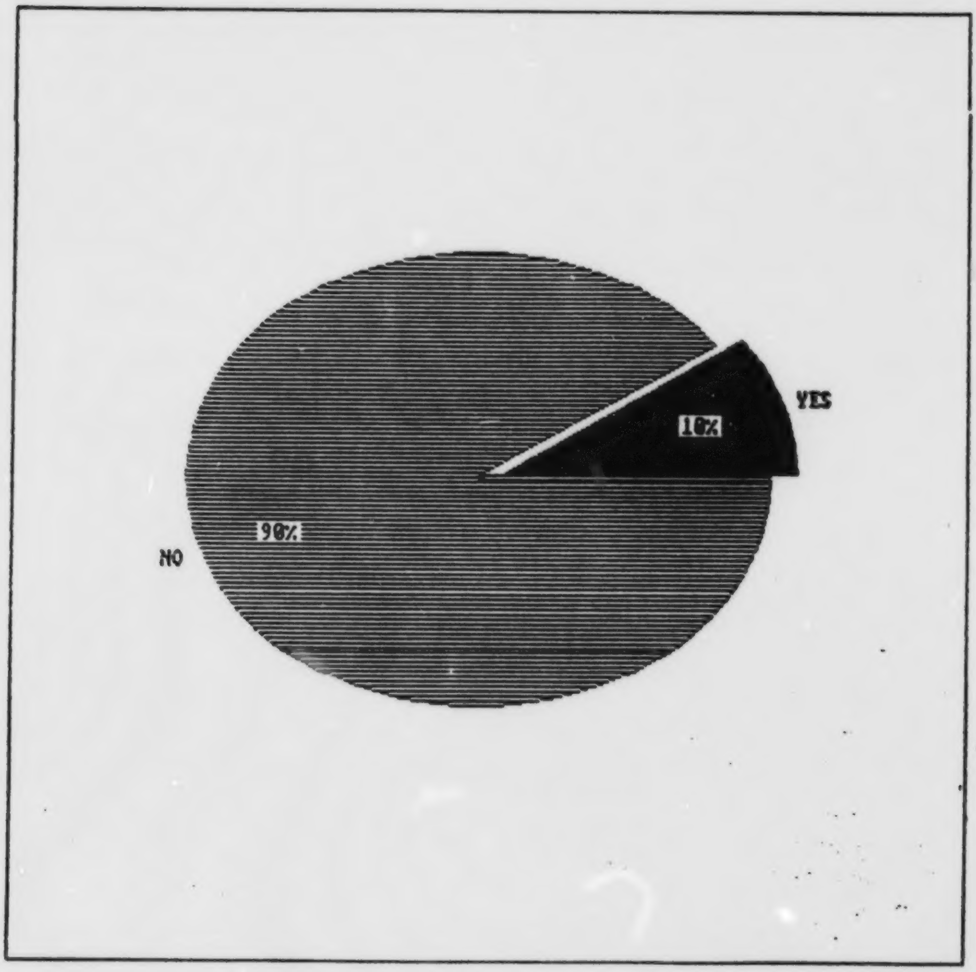


Figure 37. Display of Two (2) Naturals in the Past Years

C. THE ARTIFICIAL TREE HOUSEHOLD

Approximately 52% of Saskatchewan households with Christmas trees, displayed artificial, as previously mentioned in Section A of this Appendix.

The following is an analysis of the questions asked of these artificial tree households, followed by a graphical portrayal of the most common response to these questions.

To review statistics for the artificial tree household profile by ecoregion, type of home, family membership, income and age group (all common answers), refer to Section A, pages II-3 - II-6, of this Appendix.

Reasons for preferring artificial trees to natural by the artificial tree households are illustrated in Figure 38, page II-43. The most frequent 'other' answers included allergies, environmental concerns and convenience (see Figure 39, page II-44).

According to survey results, artificial trees have a longevity of up to twenty (20) years. Forty-five percent (45%) of this Study's respondents stated that their tree was between 1-5 years of age; 29% between 6-10 years; and 21% between 11-20 years. Therefore, the most common artificial tree life expectancy is up to 10 years of age.

The majority (62%) of artificial tree households have utilized natural trees in the past but switched their preference due to a variety of reasons including no mess, easy to set up, allergies and safety concerns (see Figures 40 & 41, pages II-45 & II-46).

Common complaints about natural trees expressed by these artificial tree households are the messiness, allergy problems, safety concerns and the cost of having to shop for a natural tree every year. However, only 37% of respondents voiced these complaints, whereas 63% would not complain about a natural tree displayed in their home. (See Figures 42 & 43, pages II-47 & II-48).

Notwithstanding the above responses, 36% of artificial tree households in Saskatchewan would definitely switch their preference to a natural, Saskatchewan-grown Christmas tree, and 44% stated they would not switch (see Figure 44, page II-49).

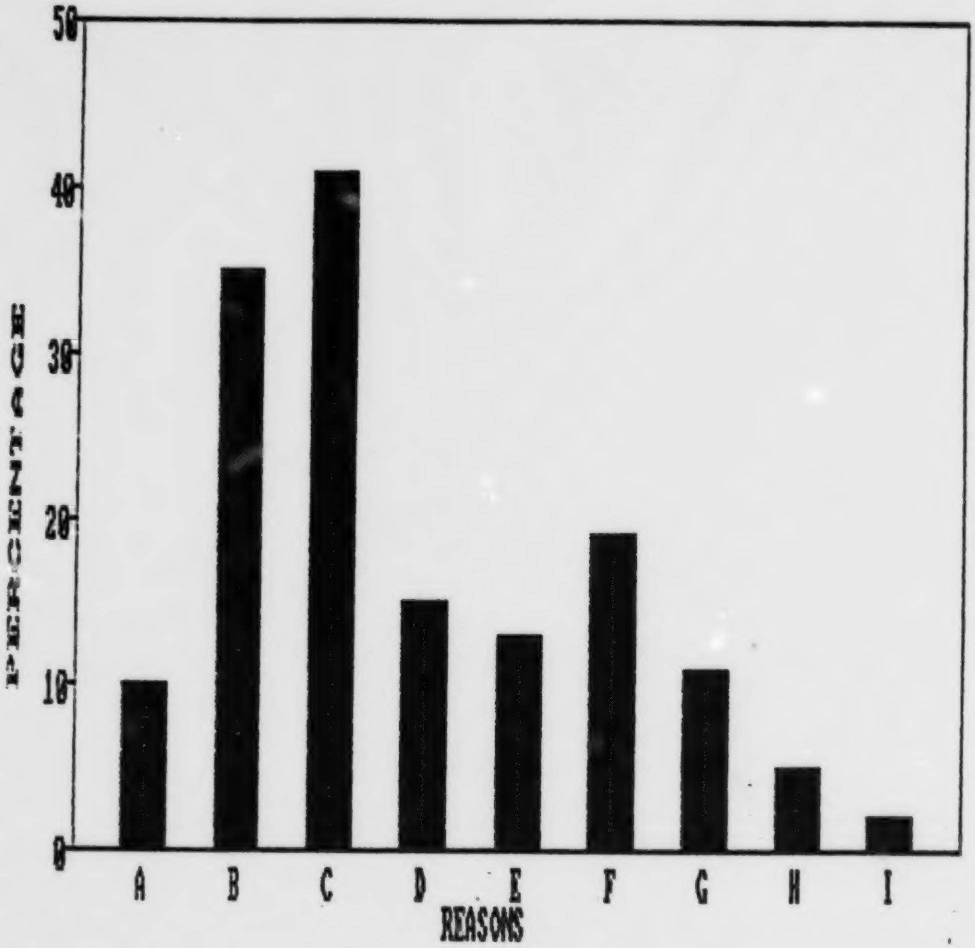


Figure 38. Reasons for Artificial Tree Preference

LEGEND

A : Personal Preference
B : No Mess
C : Other
D : Safety
E : Easy Set-Up
F : Cost
G : Change
H : Small Size
I : No Disposal Problems

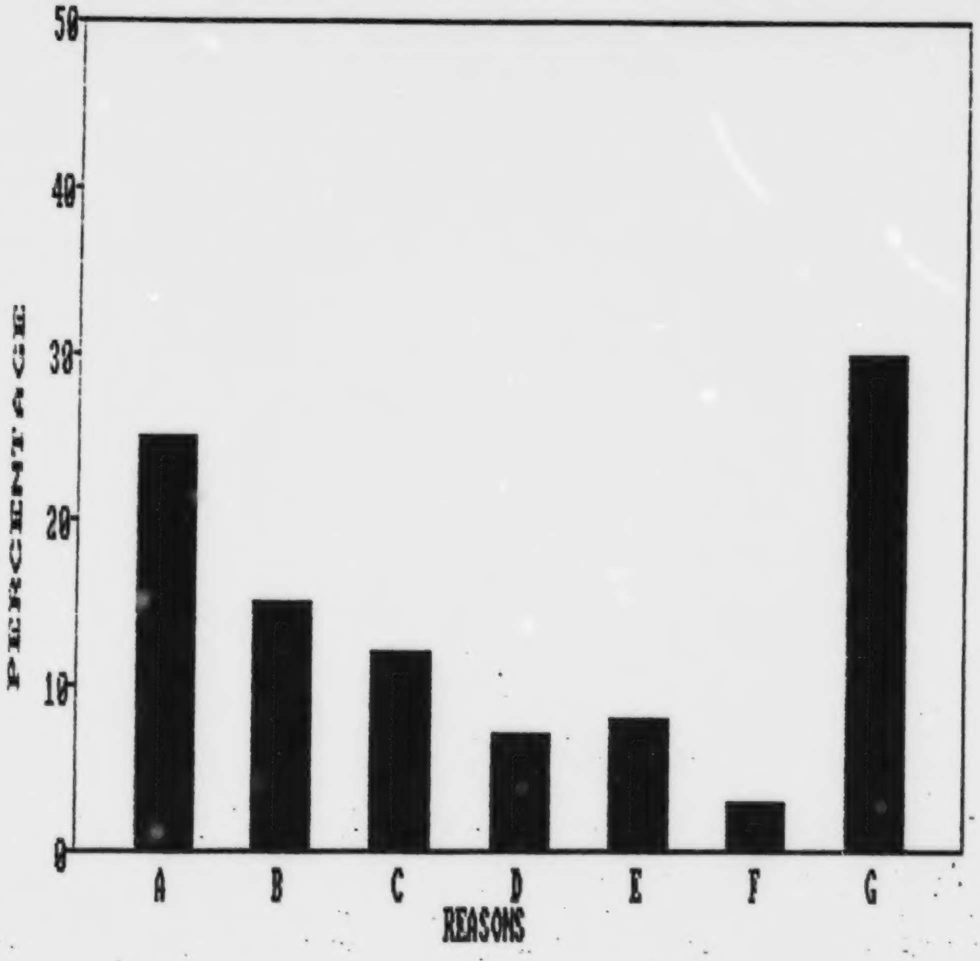


Figure 39. 'Other' Reasons for Artificial Preference

LEGEND

A : Allergies
B : Environment
C : Convenience
D : Apartment
E : No Reason
F : Ukrainian
G : Diverse

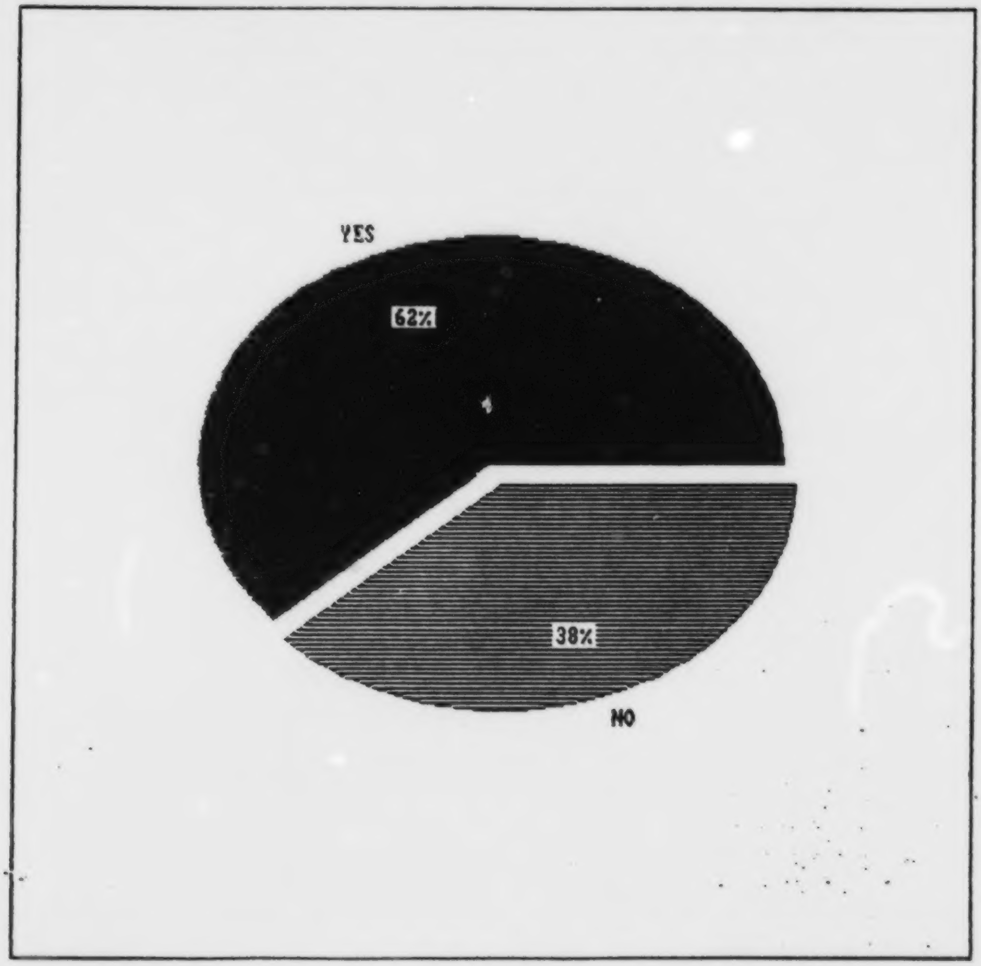


Figure 40. Switch Preference from Natural to Artificial

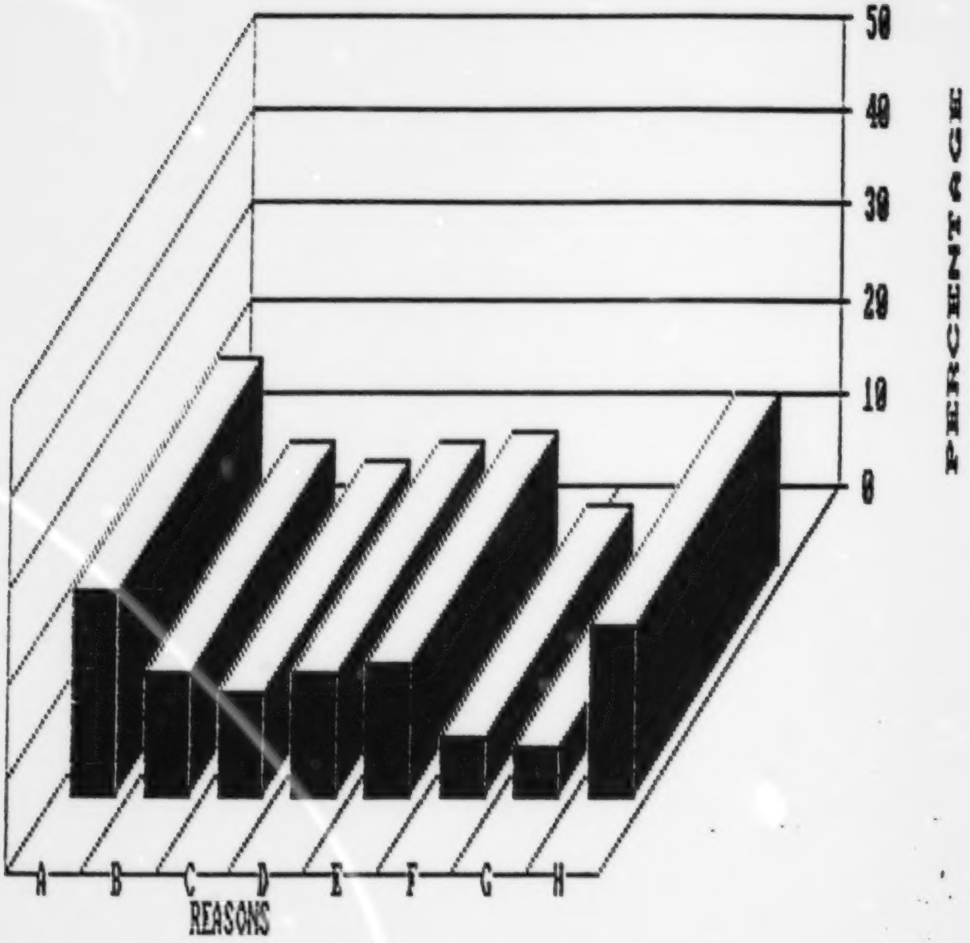


Figure 41. Reasons for Preference Change

LEGEND

A : No Mess
B : Allergies
C : Cost
D : Safety
E : Easy to Set-Up
F : Environment
G : No More Children
H : Diverse

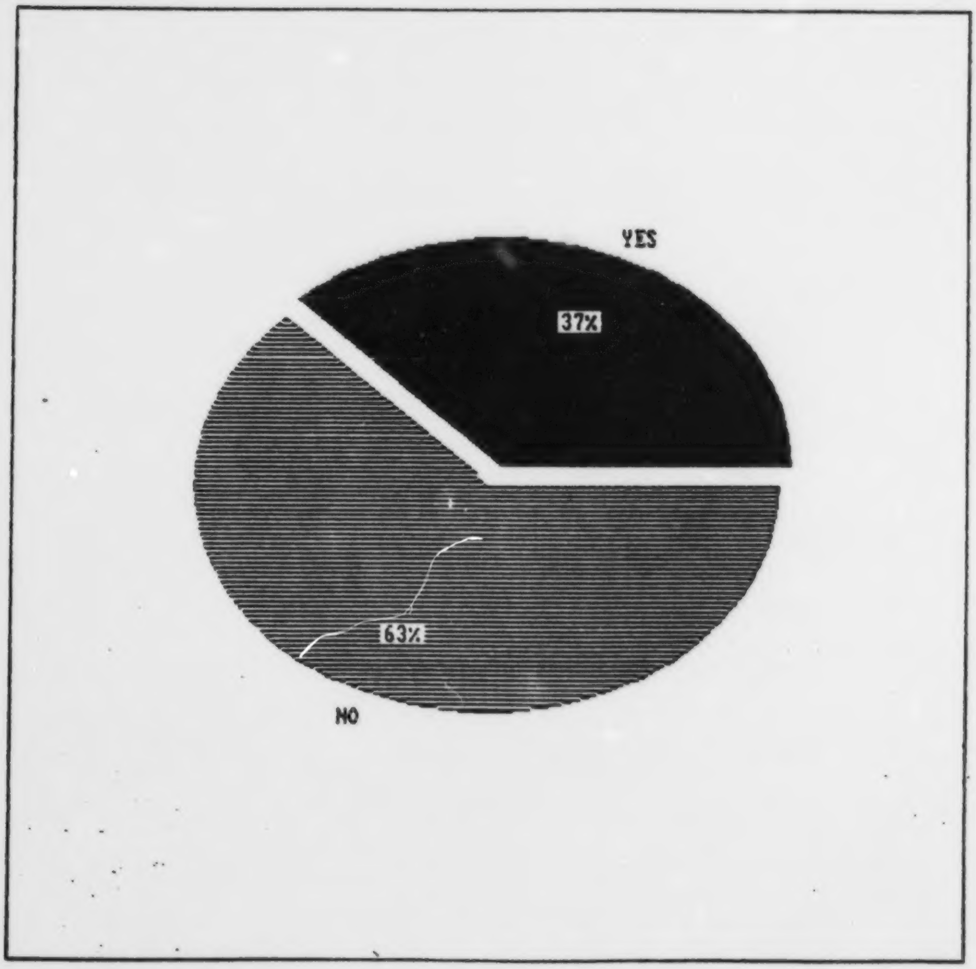


Figure 42. Complaints About Natural Trees

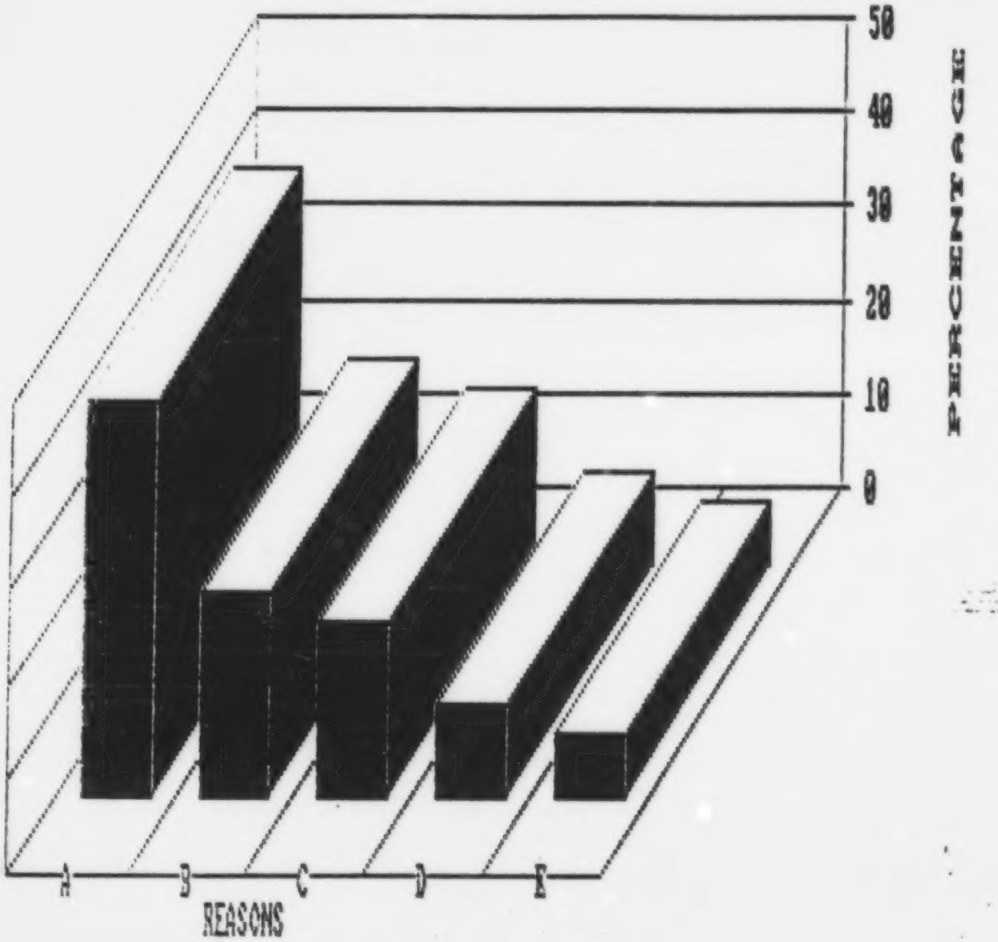


Figure 43. Reasons for Complaints

LEGEND

A : Mess
B : Allergies
C : Safety
D : Cost
E : Diverse

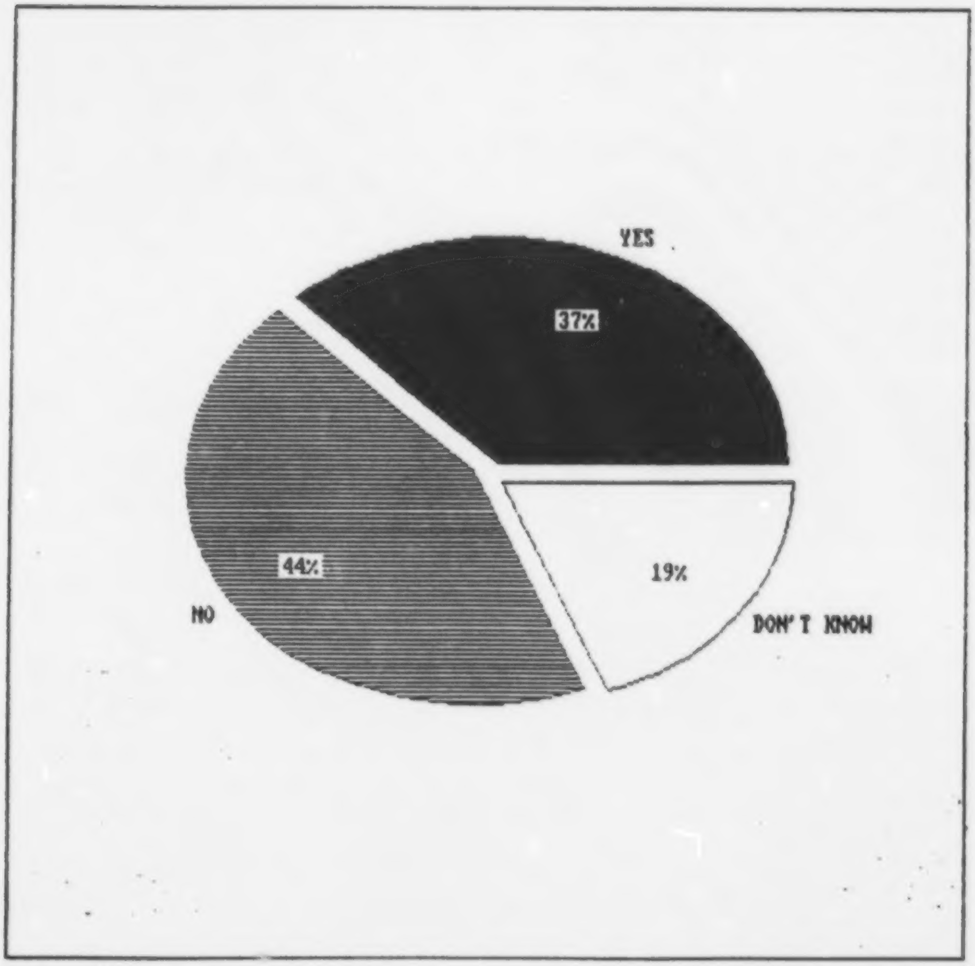


Figure 44. Possibility of Choosing a SCTGA Tree

D. THE NO-TREE HOUSEHOLD

Approximately 20% of Saskatchewan households failed to display a Christmas tree during the 1988 Holiday Season (see Section A, page II-8).

This Section of Appendix II, dealing strictly with the no-tree household, contains the smallest amount of data. However, an analysis of all answers to the questions is given, followed by a graphical representation for easy visual analysis by the reader.

To review statistics for the no-tree household profile by ecoregion, type of home, family membership, income and age group (all common answers), refer to Section A, pages II-3 - II-6, of this Appendix.

The major reason for not displaying a Christmas Tree during the 1988 Holiday season was due to the householder being absent (38%). However, over 90% of these householders would have erected a tree, had they been home. Other consumer reasons for not displaying a tree include: too much trouble, illness or death in the family, or the householder had no time for a tree. (See Figures 45 & 46, pages II-51 & II-52).

Figure 47, page II-53, shows that 69% of the respondents had displayed a Christmas tree in past years, and of these respondents, approximately 70% had always, or frequently displayed a tree.

Forty-three percent (43%) stated that they are planning on having a tree in the future and the natural tree was the most common tree (74%) indicated as being planned for (see Figure 48, page II-54). Results indicate that approximately 41% of the no-tree households are not planning on have a tree in the future.

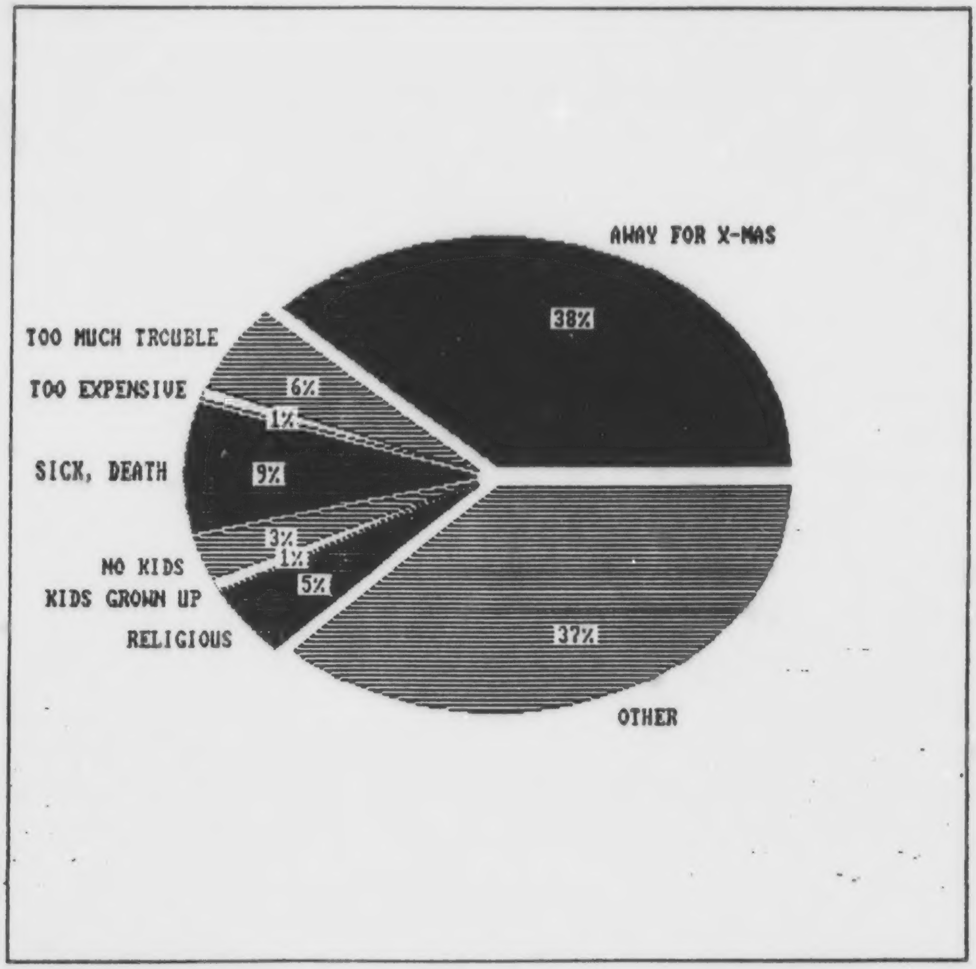


Figure 45. Reasons for Not Displaying a Tree

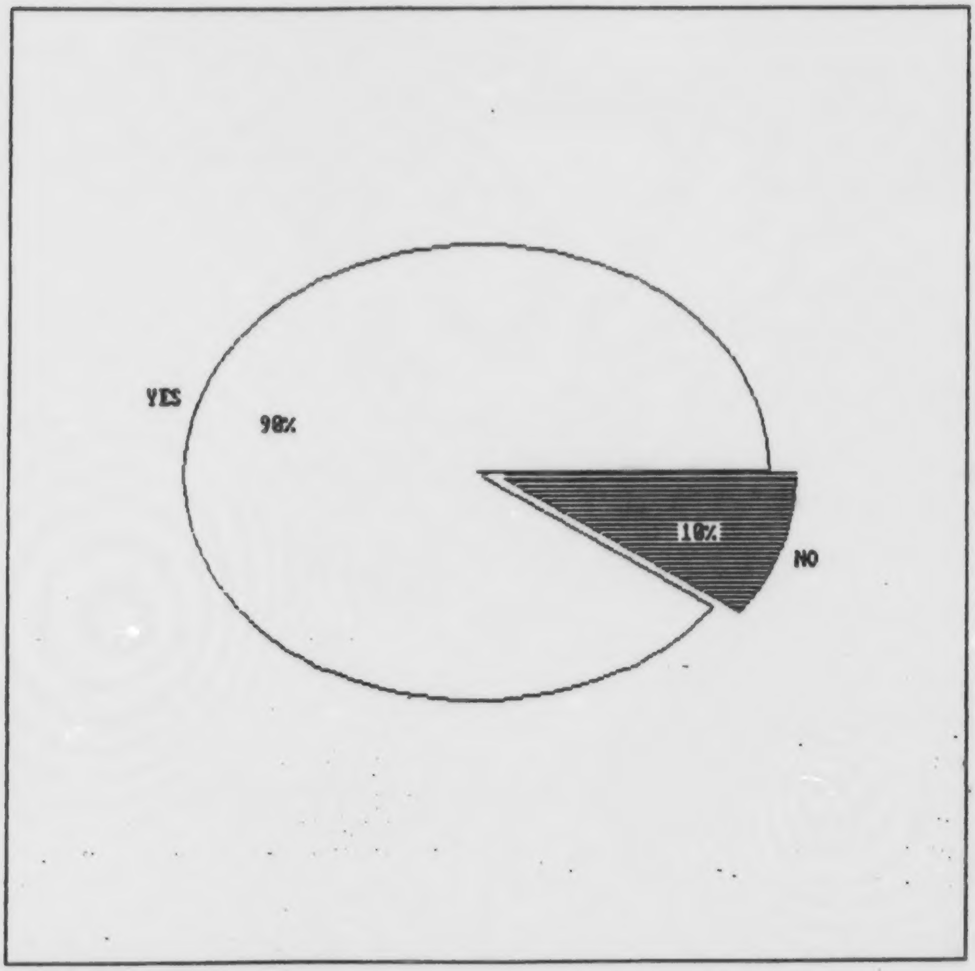
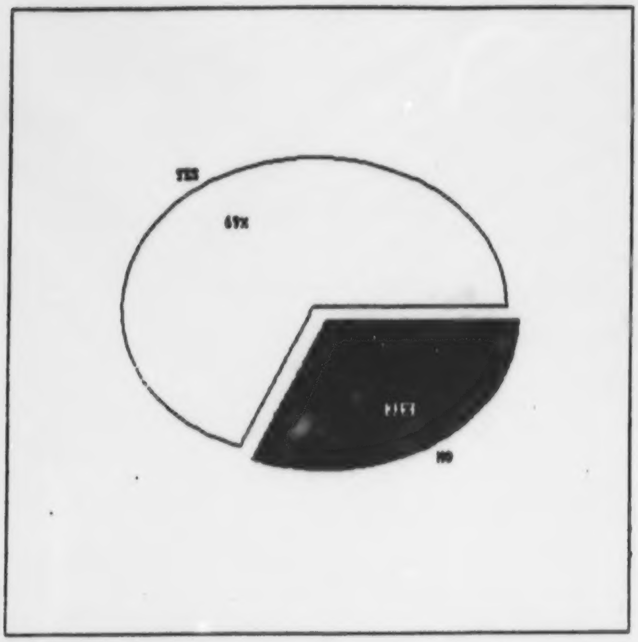
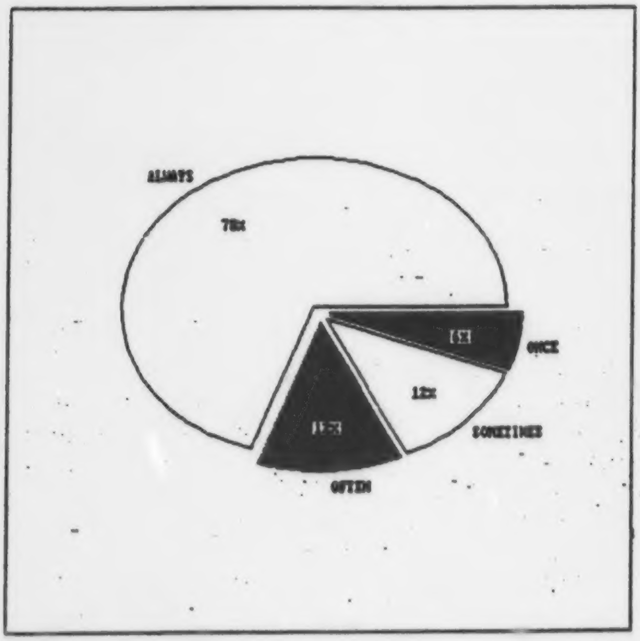


Figure 46. Tree Display if Consumer Stayed Home

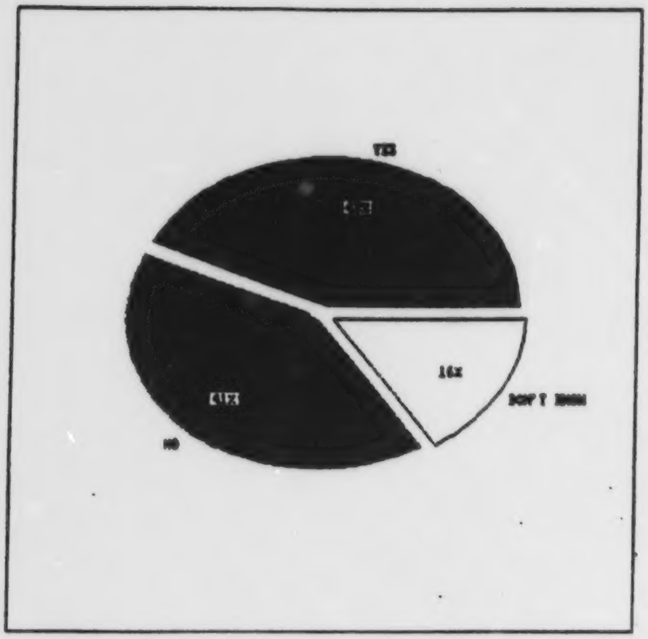


Trees Displayed in Past Years

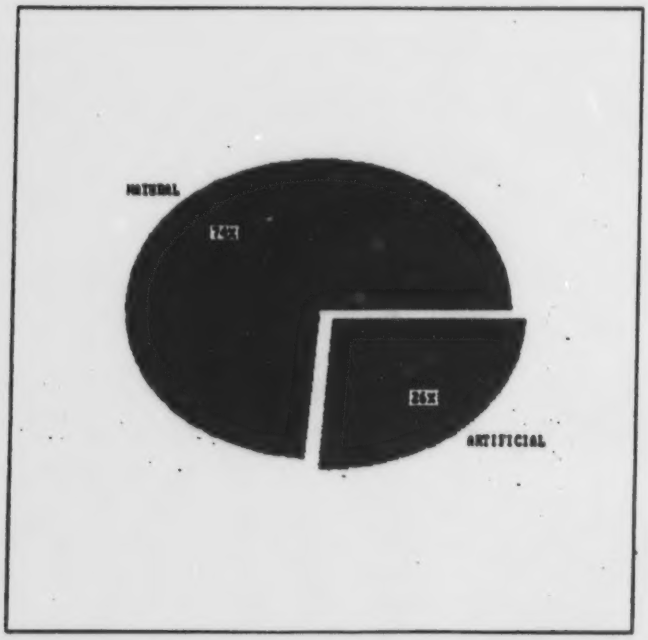


Frequency of Past Tree Display

Figure 47. Presence & Frequency of Display of Tree in Past Years



Planning a Tree in the Future



Type of Tree Planned

Figure 48. Future Plans for a Christmas Tree by Type

APPENDIX III

ANALYSIS OF INSTITUTIONAL & COMMERCIAL RESPONSES

INTRODUCTION

This Appendix deals strictly with Institutional & Commercial (business) establishment data obtained during the telephone surveying period of this Study (January 1989).

Similar to Appendix II, the answers are split up into categories or groups according to which sections of the questionnaire were completed. Thus, the four (4) groups are identified as:

A. ALL INSTITUTIONAL & COMMERCIAL ESTABLISHMENTS
B. THE NATURAL TREE ESTABLISHMENTS
C. ARTIFICIAL TREE ESTABLISHMENTS
D. NO-TREE ESTABLISHMENTS

Section A contains a short analysis and graphical presentation of common answers by all respondents. Section B - D contains a more detailed look at the individual establishment types, to point the way towards similar, key characteristics.

A. ALL INSTITUTIONAL & COMMERCIAL ESTABLISHMENTS

A total of 124 institutional & commercial establishments responded to the telephone survey. Table 9 (below) summarizes the locations of these establishments, by city, town & village.

Table 9. INSTITUTIONAL & COMMERCIAL TELEPHONE SURVEY COVERAGE

CITY / TOWN / VILLAGE	COVERED POPULATION	INSTITUTIONAL-COMMERCIAL*
CITY		
SASKATOON	183,487	23 (1)
REGINA	179,400	12 (0)
MOOSE JAW	35,522	8 (0)
PRINCE ALBERT	34,369	8 (1)
SWIFT CURRENT	16,144	5 (0)
YORKTON	16,121	10 (0)
NORTH BATTLEFORD	14,745	4 (0)
ESTEVAN	10,498	4 (0)
WEYBURN	10,347	4 (0)
LLOYDMINSTER	6,960	3 (1)
MELFORT	6,296	6 (0)
MELVILLE	5,353	6 (0)
KINDERSLEY	5,059	4 (0)
REPRESENTATIVE TOWNS		
MEADOW LAKE	4,188	4 (1)
ASSINIBOIA	2,991	5 (0)
ROSETOWN	2,808	4 (0)
CANORA	2,595	3 (0)
MAPLE CREEK	2,517	3 (0)
WADENA	1,717	2 (0)
GRENFELL	1,267	3 (0)
DAVIDSON	1,232	3 (0)
MAIDSTONE	1,114	1 (0)
LEADER	1,073	1 (0)
REPRESENTATIVE VILLAGES	7,500**	
WATSON		
STOUGHTON		
ROCKGLEN		1 (0)
FOX VALLEY		
EATONIA		
KENNASTON		
DELISLE		
PENSE		
PONTEIX		1 (0)
COLEVILLE		
TOTALS	553,303	128 (4)

* ( ): represent number of refusals.

** Estimated average population per village: 750

Over 74% of institutions & commercial establishments displayed some type of Christmas tree during the 1988 Holiday Season (see Figure 49, page III-4).

Artificial trees predominated these establishments at a 77% frequency, natural trees occurred only 19% of the time, and the remainder displayed both artificial & natural trees (see Figure 50, page III-5).

The commercial industry (retail, service & manufacturing sectors) dominated the number of questionnaire respondents (54%), while institutions (hospitals, churches, schools, banks & nursing homes) made up the remainder of respondents (46%) (see Figure 51, page III-6). Figure 52, page III-7, illustrates how the majority (81%) of respondents located in a separate building as opposed to being located in a small, open plaza or apartment building.

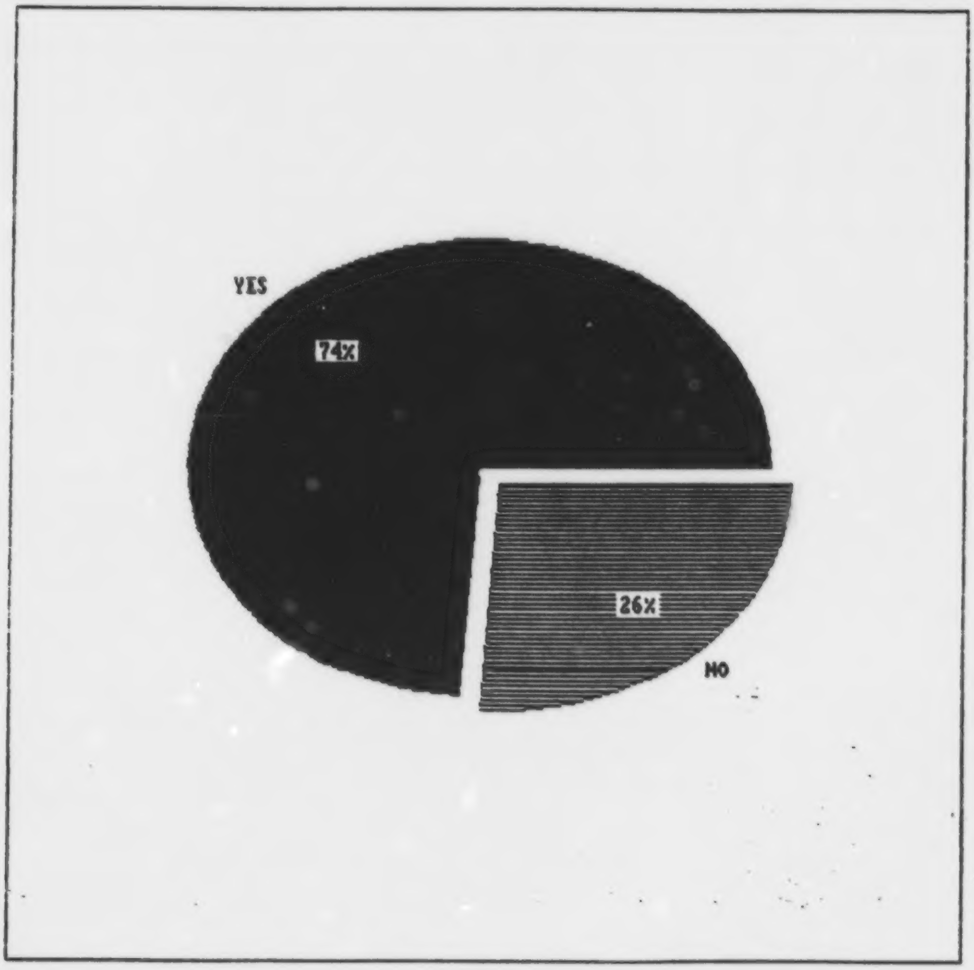


Figure 49. Did the Establishment Display a Tree?

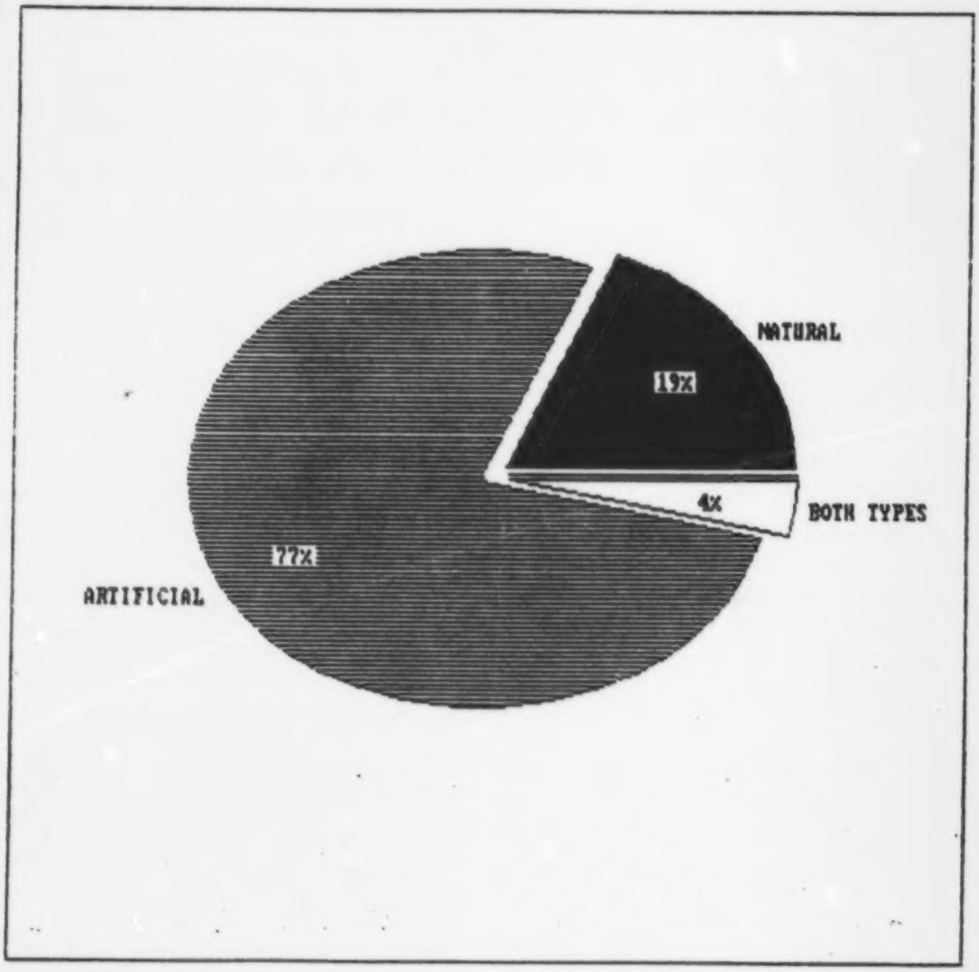


Figure 50. Type of Tree Displayed

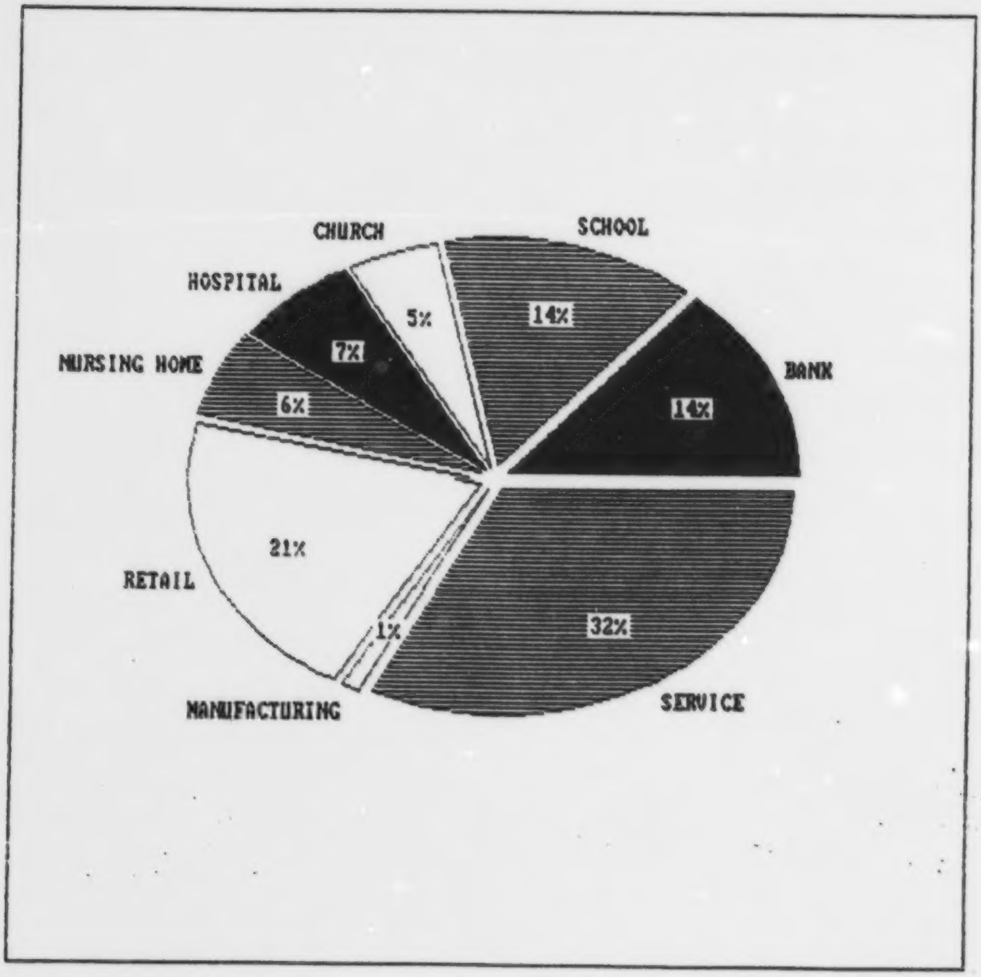


Figure 51. Institutional & Commercial Type

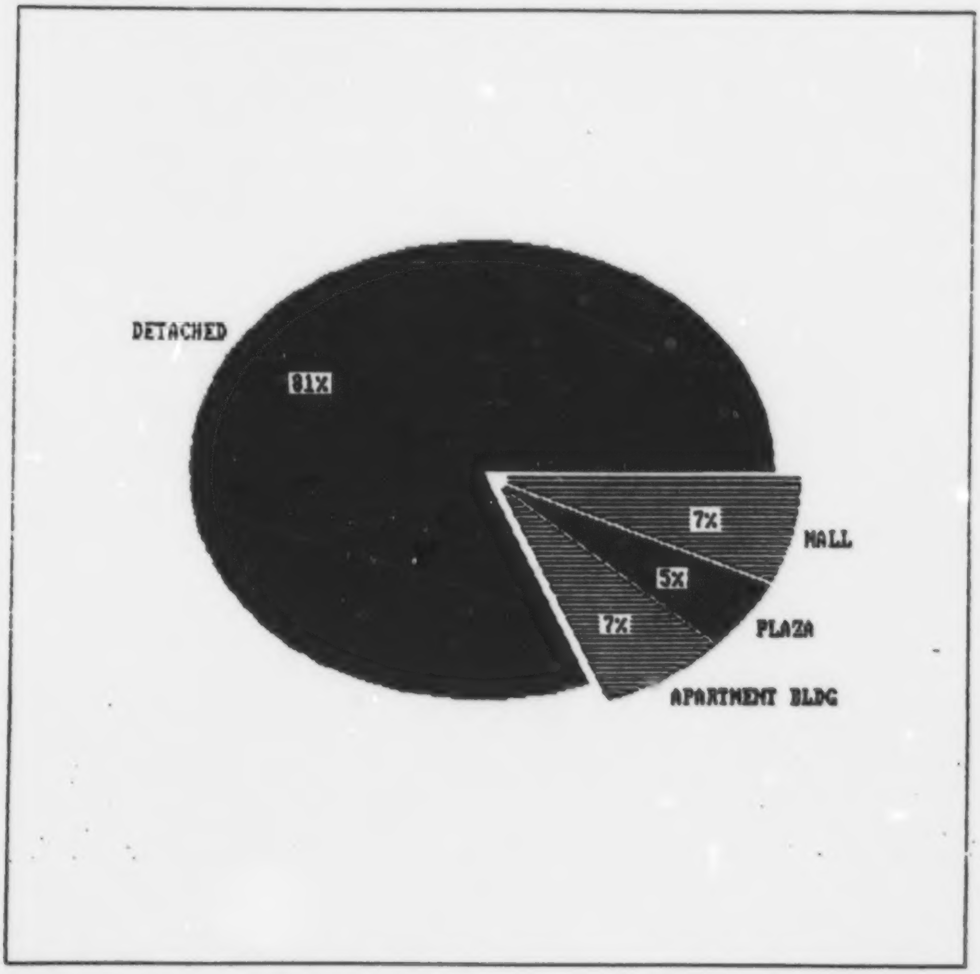


Figure 52. Establishment Location

B. THE NATURAL TREE ESTABLISHMENT

A total of 19% of surveyed establishments displaying a Christmas tree during the 1988 Holiday Season chose to put up a natural tree (see Figure 50, page III-5). No statistical data is available on the actual people involved in the decision-making process. However, it was generally concluded by all interviewers that management (administration) persons held this responsibility. In fact, in order to hasten the telephone survey process, it was found that asking for the manager, or head of administration, enabled all questions to be efficiently answered.

Another general observation made is that maintenance staff or janitors of institutions (i.e. schools & banks) were responsible for the actual purchasing of the natural tree. Figure 53, page III-9, illustrates how 57% of the purchasers, in all surveyed establishments, were secretarial or 'other' staff members.

The majority of natural trees purchased were between 5 - 10 feet in height (76%) and were not sprayed (or dipped) with any type of fire retardant substance (81%). (See Figures 54 & 55, pages III-10 & III-11).

Often these trees were given as gifts rather than purchased from temporary lots or retail stores. In fact, it was common to find that a community organization had donated a tree to the establishment or, especially with retail outlets, a person was retailing trees in the parking lot of the respective store and donated the natural tree as a show of good faith.

Commonly, establishments have a special fund set aside from which monies are used for special purchases, such as Christmas trees.

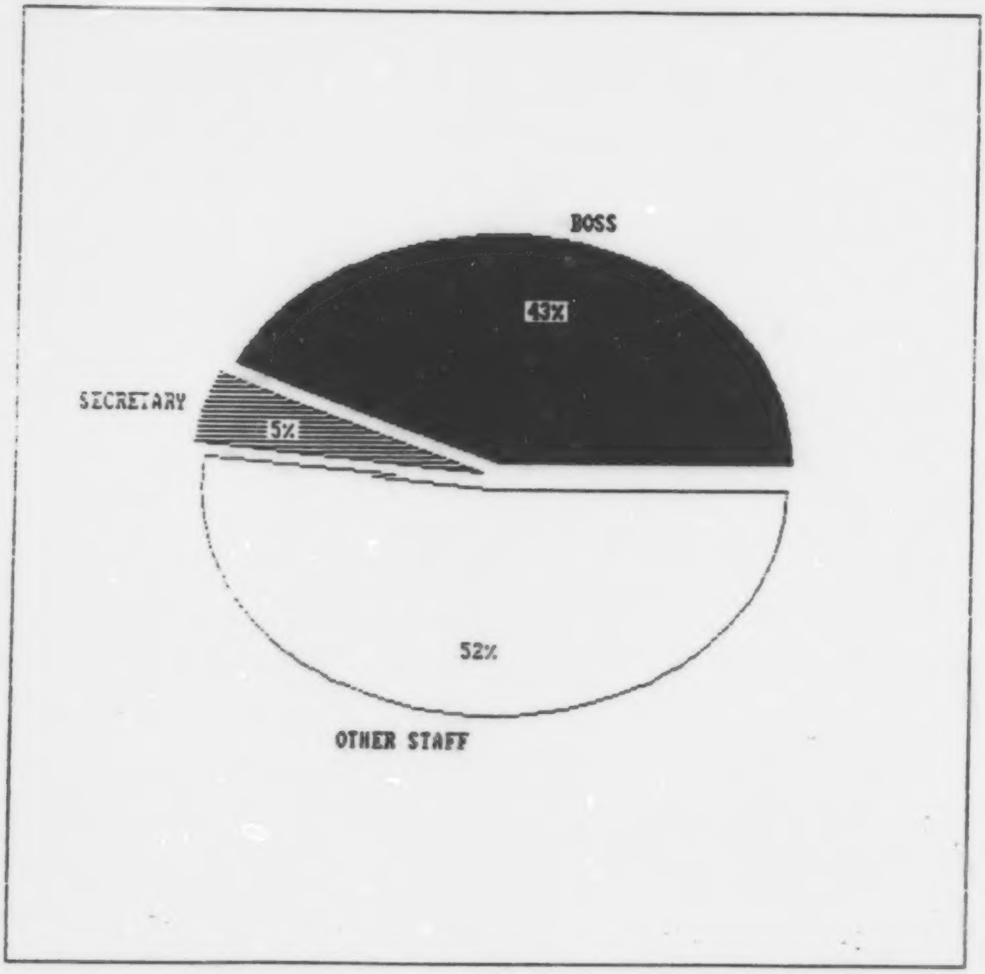


Figure 53. Christmas Tree Purchaser

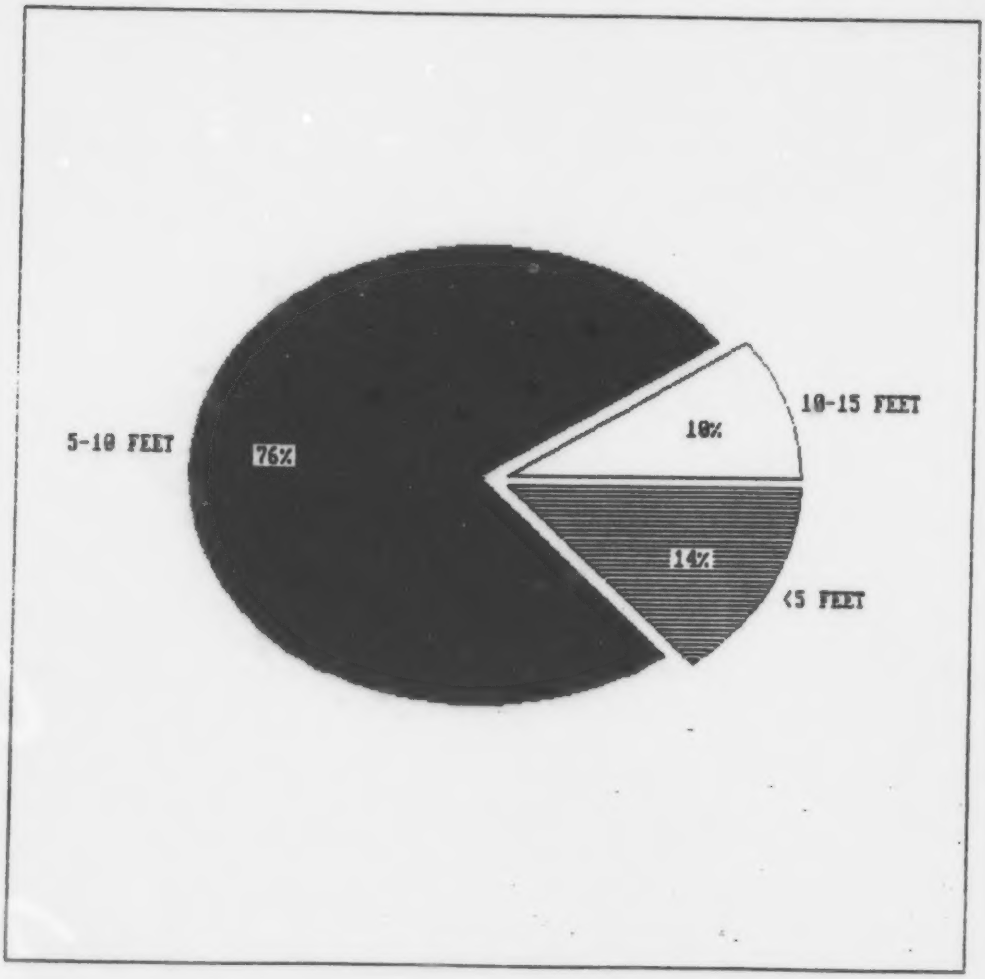


Figure 54. Height of the Tree

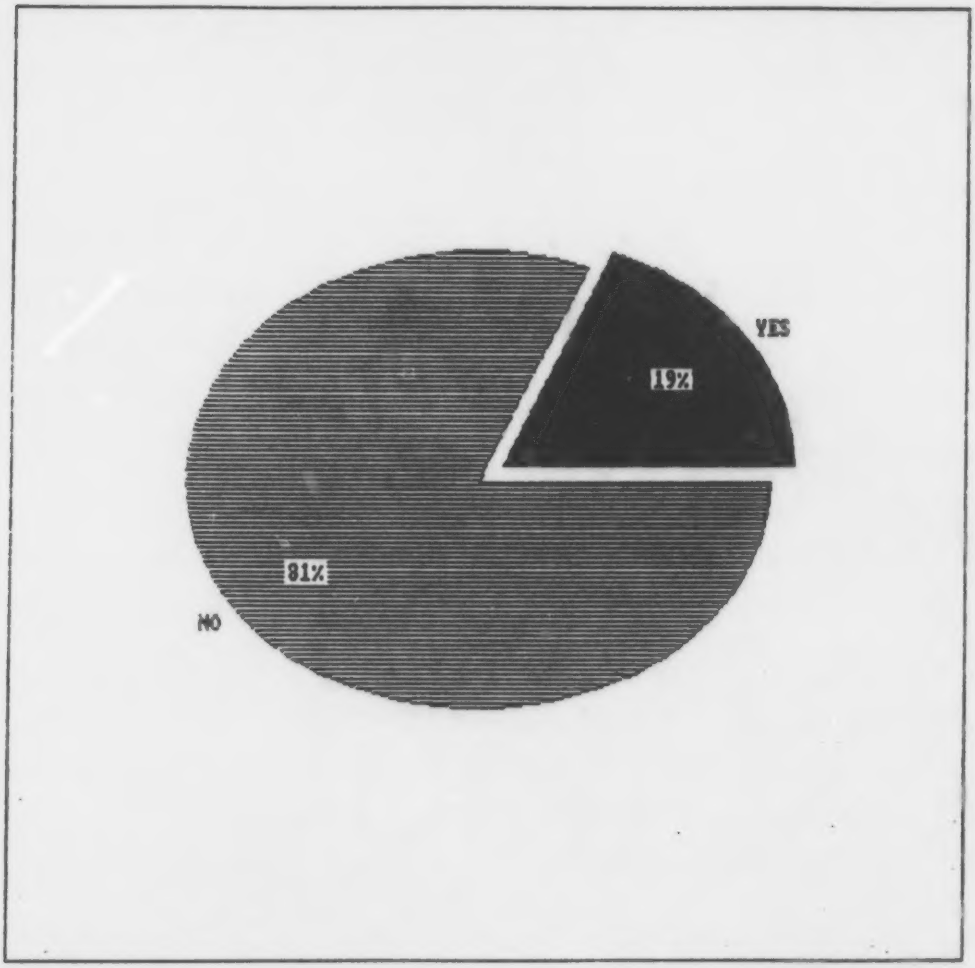


Figure 55. Frequency of Fire Retardant Treatment

C. THE ARTIFICIAL TREE ESTABLISHMENT

Clearly, the artificial tree was the most popular type of Christmas tree used in institutions & commercial establishments. Out of the 77% users of these trees (see Figure 50, page III-5), 22% mentioned that they had switched their preference from natural to artificial trees (see Figure 56, page III-13).

The actual reasons for switching preference were commonly fire regulation restrictions (53%), and longevity & convenience (47%) (see Figure 57, page III-14). This first reason will be summarized further on in this section.

Artificial trees in use were similar in age to residential artificial trees. Eighty-nine percent (89%) of establishments had used their trees ten year or less, whereas older artificial trees (>10 years) were found only 11% of the time.

Twenty-two percent (22%) of establishments said that they would switch to a natural Saskatchewan-grown Christmas tree should the opportunity arise (see Figure 58, page III-15). However, the majority of respondents (55%) were satisfied with their artificial tree and would not switch preference. A substantial percentage (22%) said that they were not sure if they would switch because it was unclear if budget money was available, whether the SCTGA would donate the trees, or whether fire regulations would permit a natural tree.

Hospitals, banks and hotels frequently used more than one artificial tree in their building. Commonly, the front lobby contained one tree and each floor, or office/department, would display a similar sized tree.

SAFETY CONCERNS

Comments frequently heard throughout the survey were related to fire regulations preventing the use of natural trees in certain building types.

The following is a list of cities & towns where these comments originated from:

- Saskatoon
- Regina
- Estevan
- Weyburn
- Moose Jaw
- Swift Current
- Melville
- Yorkton
- Leader
- Melfort
- Grenfell
- Canora

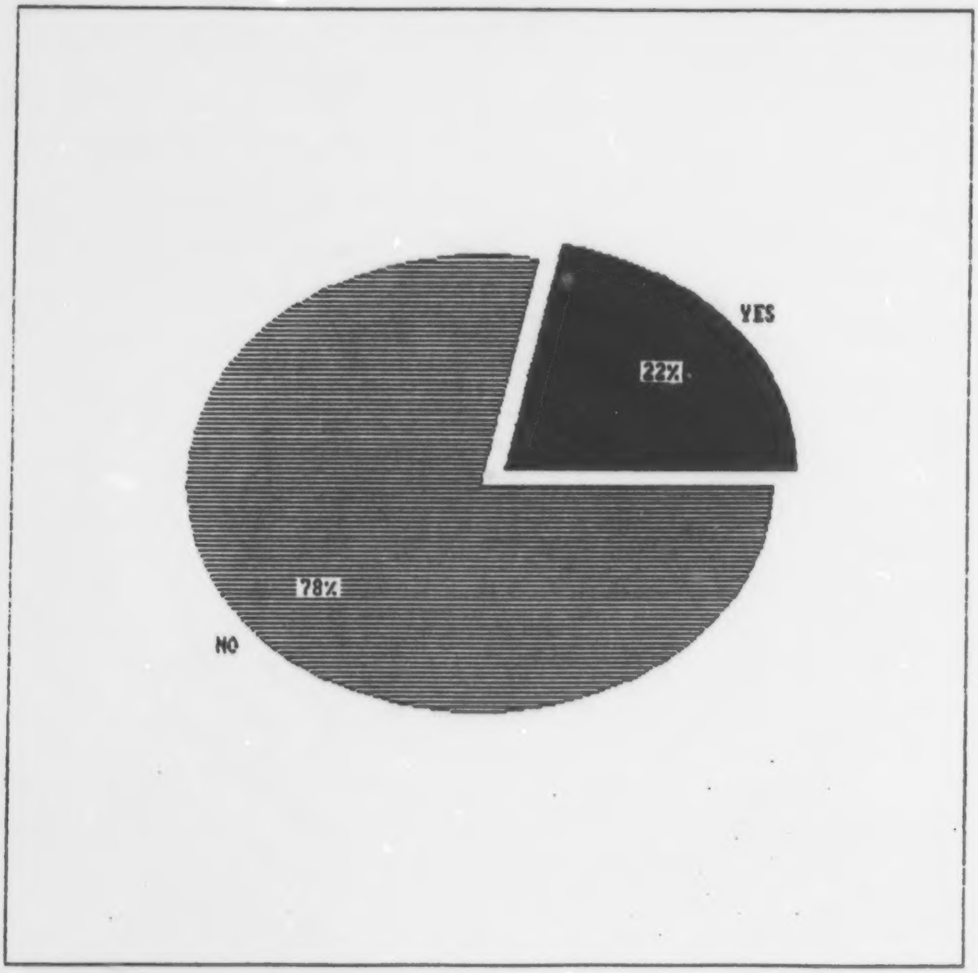


Figure 56. Preference Switch from Natural to Artificial

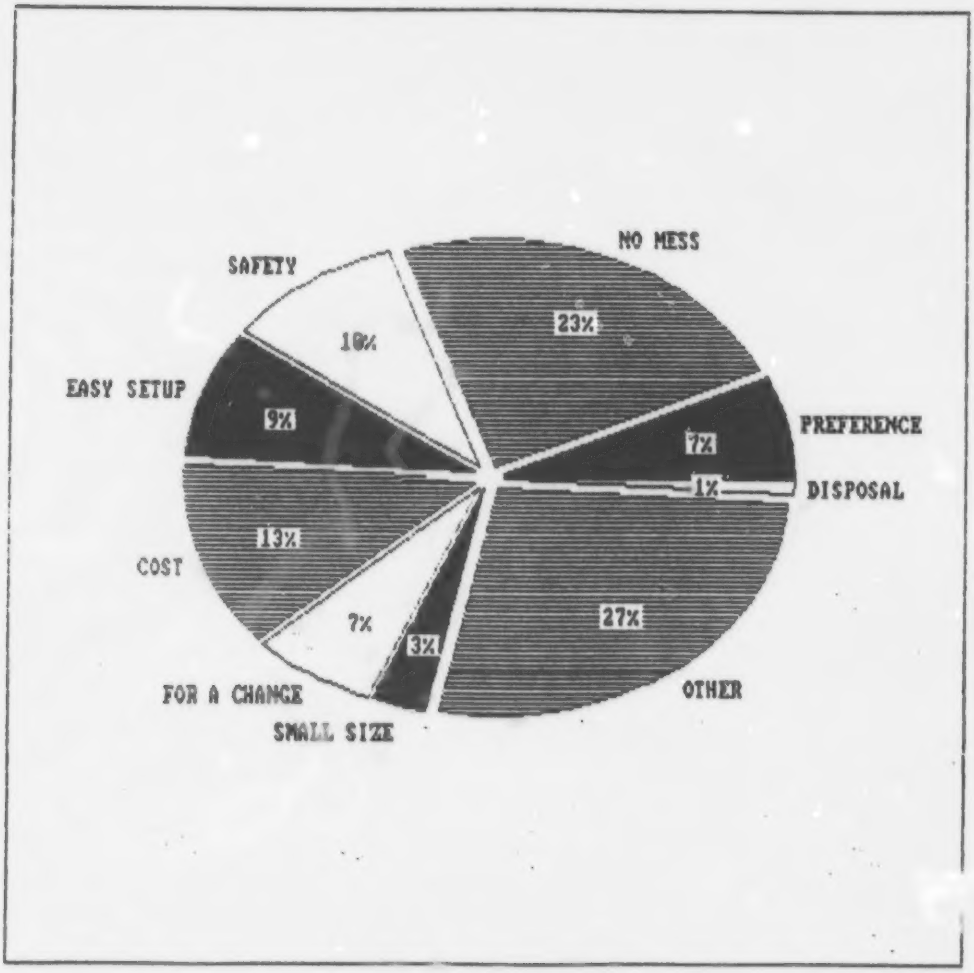


Figure 57. Reasons for Preferring Artificial Trees

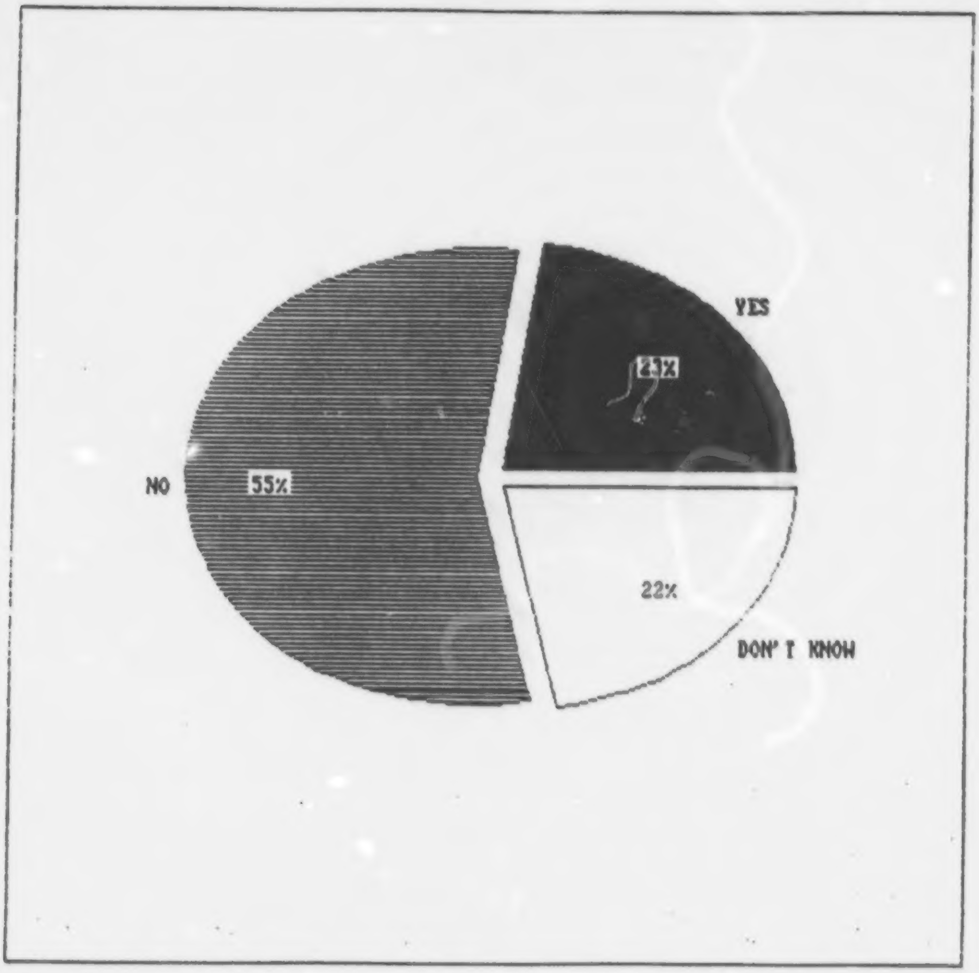


Figure 58. Preference Switch to SCTGA Trees

D. THE NO-TREE ESTABLISEMENT

A total of 26% of all surveyed establishments failed to display any type of Christmas tree (see Figure 50, page III-5).

Generally, small office-size (47%) and too much trouble (9%) were common reasons, found in Figure 59, page III-17, as well as a large assortment (41%) of 'other' answers including:

- didn't bother
- no extra money
- religious reasons
- no reason.

Figures 60 & 61, pages III-18 & III-19, illustrate that 78% of these establishments have not displayed trees in past years, and almost 81% are not planning to display one in the future. Out of the 19% of respondents planning to display a tree in the future, the majority (66%) will choose an artificial tree, whereas 34% felt that the natural tree would be displayed (see Figure 62, page III-20).

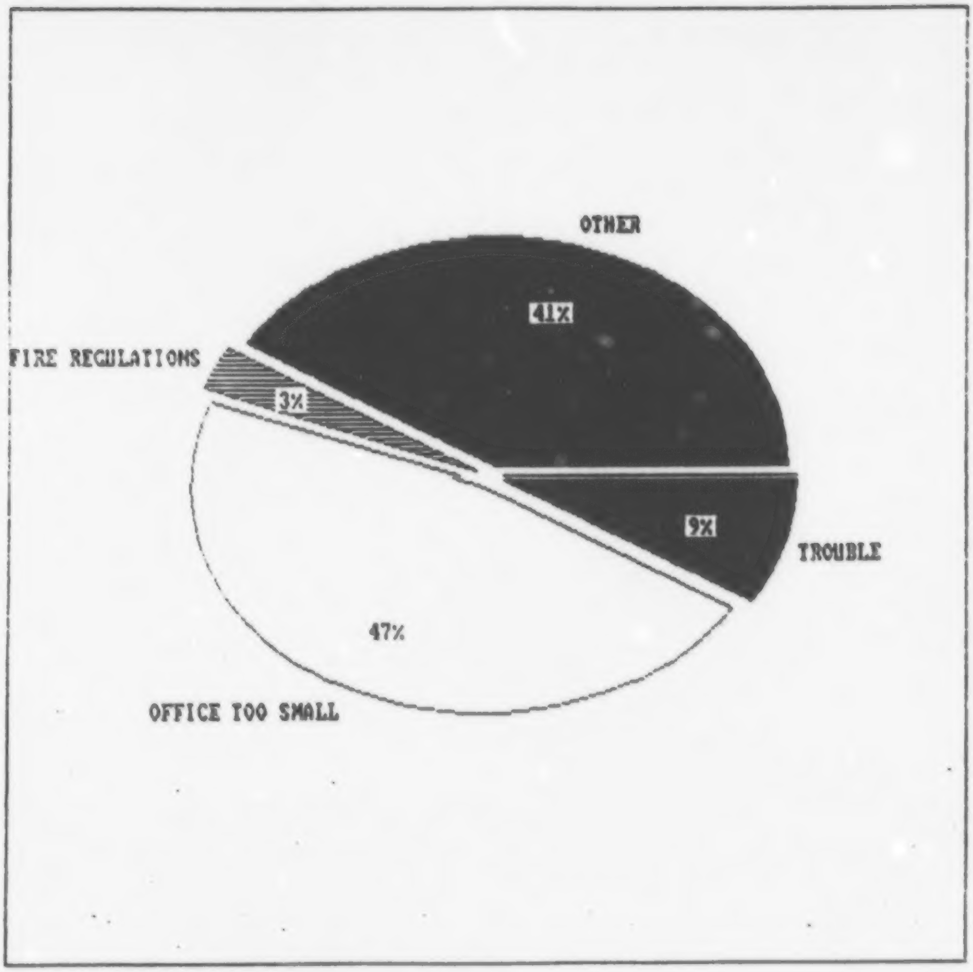


Figure 59. Reasons for Not Displaying a Tree

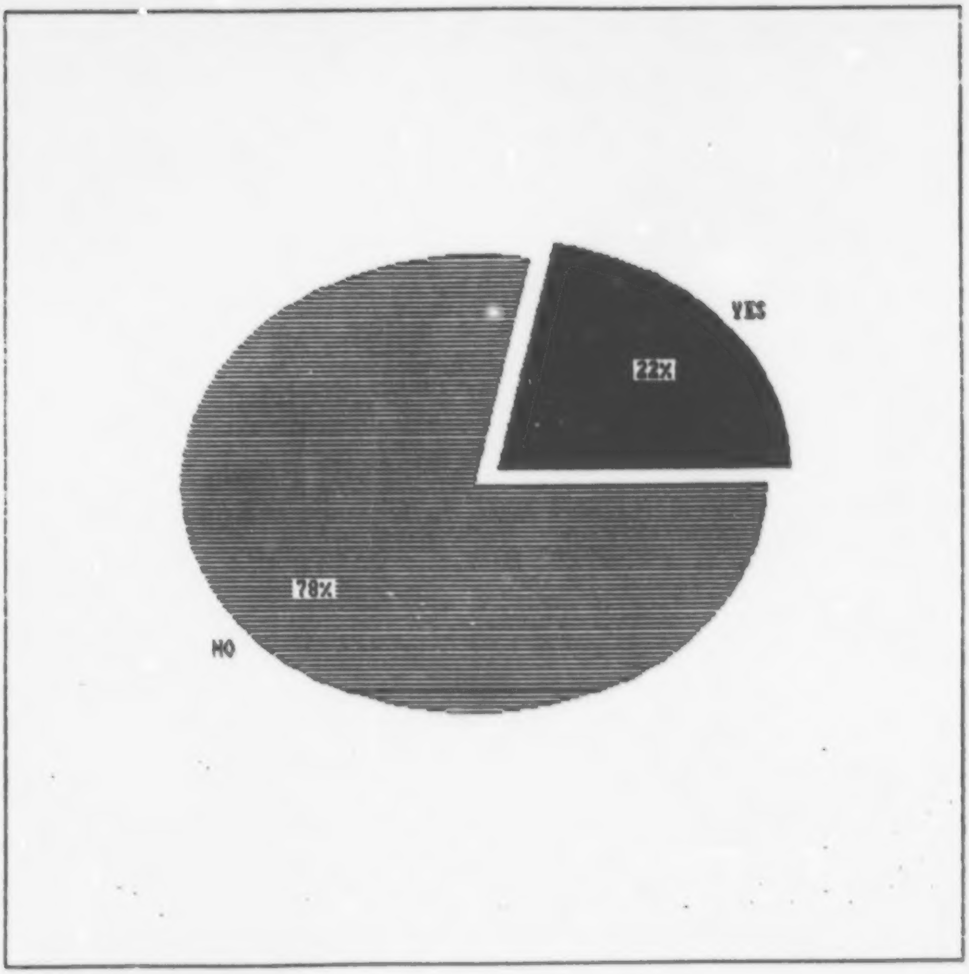


Figure 60. Has the Establishment Displayed Trees in the Past Years?

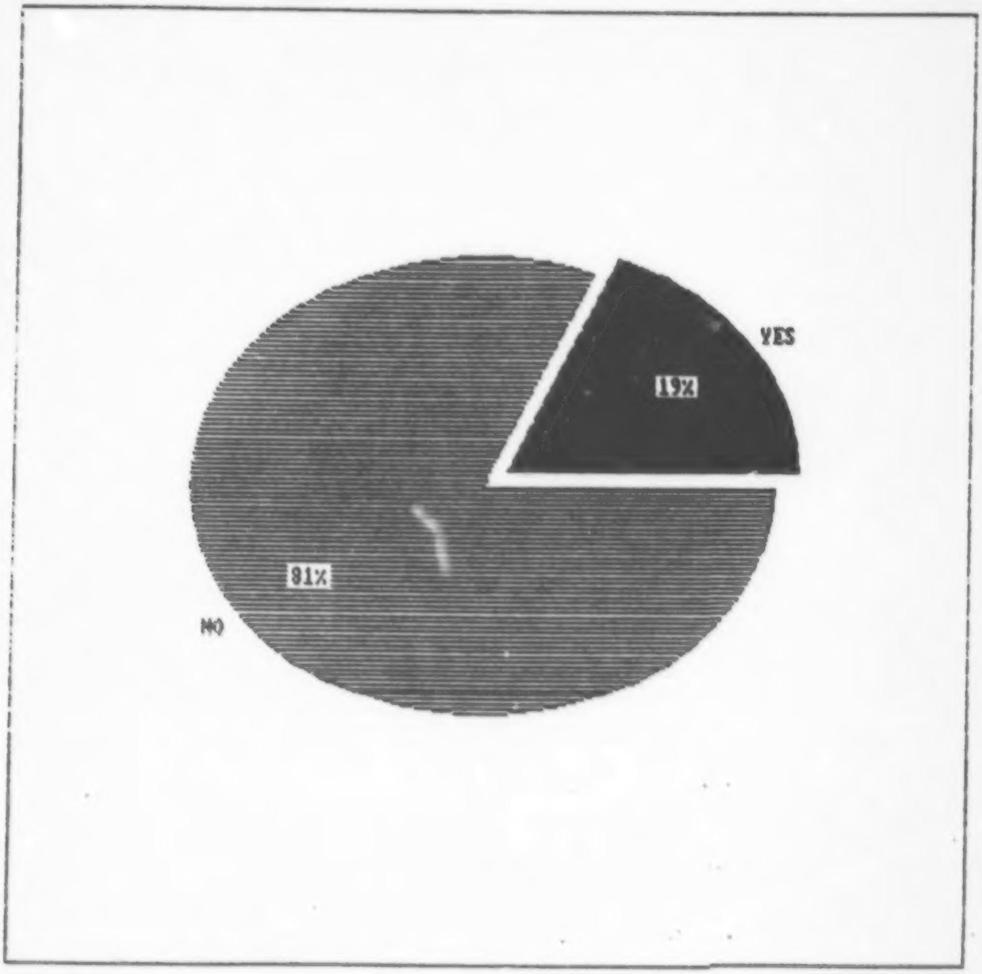


Figure 61. Planning a Tree in the Future

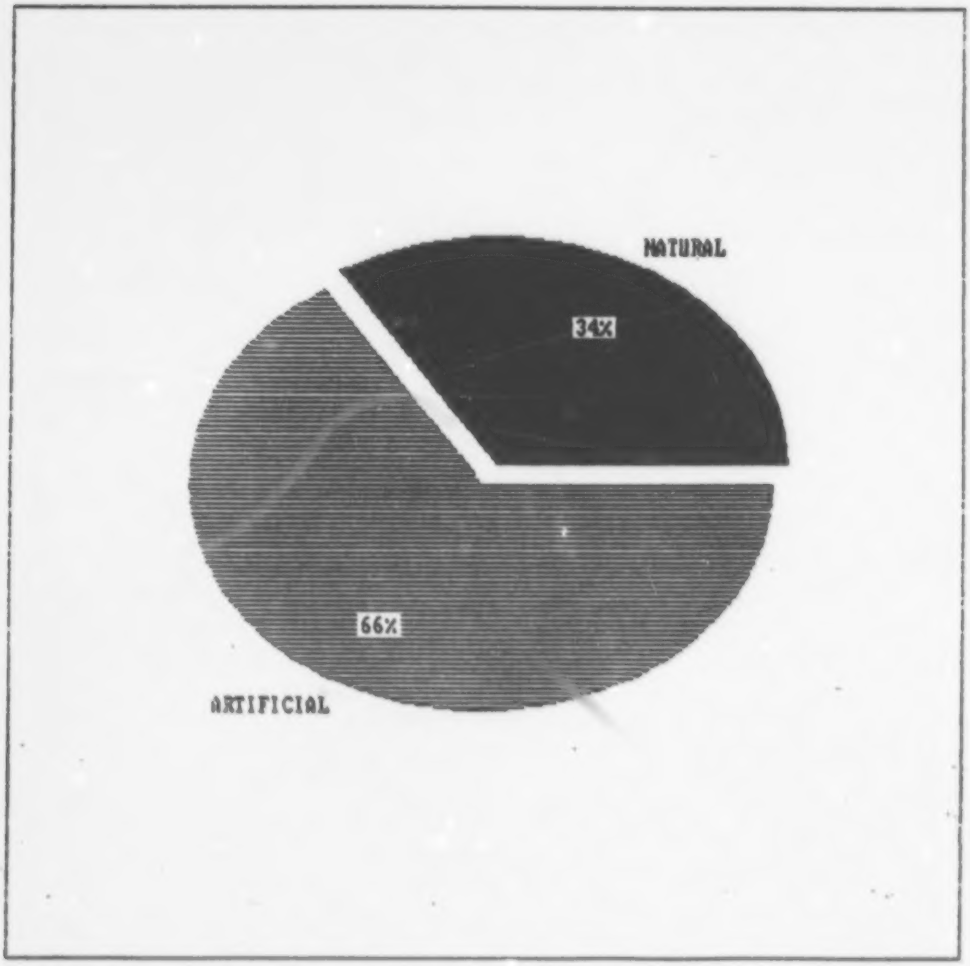


Figure 62. What Type of Tree Planned?

APPENDIX IV

ANALYSIS OF RETAILER RESPONSES

INTRODUCTION

This Appendix deals strictly with the 1988 Saskatchewan potential and confirmed natural Christmas tree retailers' respondent data. Although January 31st/89 was emphasized as the deadline for responses, questionnaires were still being received during the month of February 1989. This data was not useful for the purpose of this report, but will provide additional information to the SCTGA membership for future contacting targets.

Four (4) sections in this Appendix have been identified for analysis as follows:

A. ALL RETAILER RESPONDENT DATA
B. RETAILER MARKET OPINIONS
C. RETAILER MARKETING TECHNIQUES
D. LIST OF CONFIRMED 1988 NATURAL CHRISTMAS TREE RETAILERS

Each Section contains a brief analysis of the respondent data, followed by a graphical or tabular presentation of the data.

A. ALL RETAILER RESPONDENT DATA

Table 10 (following page) lists the completed retailer mail survey coverage. As indicated in Appendix I, the 177 potential retailers was the total number of mailed out (or hand delivered) questionnaires. Twenty-four (24) questionnaires were returned unanswered, due to a variety of reasons, which included:

- no longer selling natural Christmas trees;
- have never sold natural Christmas trees; and
- change of address.

However, a total of twenty-three (23) natural Christmas tree retailers did respond to the questionnaire (see Section D of this Appendix) before January 31st/89, reporting sales of approximately 40,000 trees.

Figure 63, page IV-4, illustrates how the majority of respondents (63%) were independent retailers (have their own business), followed by service organizations (22%), and clubs & groups (10%). Retail chain stores (i.e. Canadian Tire Stores) composed only 5% of the respondents, although many of their parking lots were utilized by independent retailer temporary lots.

One-half (½) of the respondents can be considered experienced retailers with greater than 5 years experience in selling trees. Twenty-seven percent (27%) were first year sellers, each selling less than 1,000 trees. (See Figure 64, page IV-5).

Figure 65, page IV-6, illustrates how 64% of respondents had their stock delivered to their lot by a supplier, whereas 36% actually picked up their trees and personally delivered it to their lots.

Table 10. RETAILER MAIL SURVEY COVERAGE

CITY / TOWN / VILLAGE	COVERED POPULATION	POTENTIAL RETAILERS	CONFIRMED RETAILERS	TOTAL RESPONDENTS
CITY				
SASKATOON	183,487	34	22**	5
REGINA	179,400	20	6**	2
MOOSE JAW	35,522	18	8**	3
PRINCE ALBERT	34,369	21	15	7
SWIFT CURRENT	16,144	12	6	1
YORKTON	16,121	12	7**	1
NORTH BATTLEFORD	14,745	11	4	1
ESTEVAN	10,498	10	3	1
WEYBURN	10,347	9	1	
LLOYDMINSTER	6,960	8	4	
MELFORT	6,296	5	1	
MELVILLE	5,353	6	1	
KINDERSLEY	5,059	6	3	1
REPRESENTATIVE TOWNS				
MEADOW LAKE	4,188	5	N/A	
ASSINIBOIA	2,991		1	1
ROSETOWN	2,808			
CANORA	2,595			
MAPLE CREEK	2,517			
WADENA	1,717			
GRENFELL	1,267			
DAVIDSON	1,232			
MAIDSTONE	1,114			
LEADER	1,073			
REPRESENTATIVE VILLAGES	7,500*			
WATSON				
STOUGHTON				
ROCKGLEN				
FOX VALLEY				
EATONIA				
KENNASTON				
DELISLE				
PENSE				
PONTEIX				
COLEVILLE				
TOTALS	553,303	177	82	23

* Estimated average population per village: 750.

** Retailers present in more than one City.

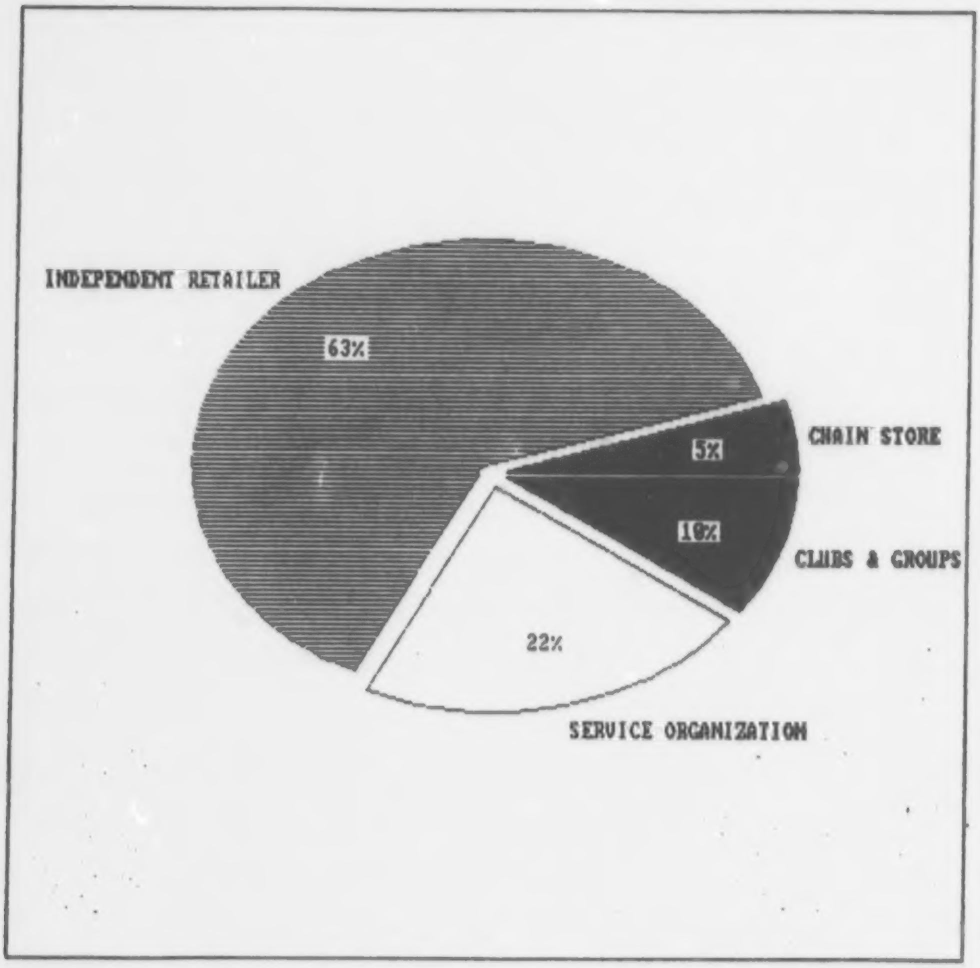


Figure 63. Retailer Category

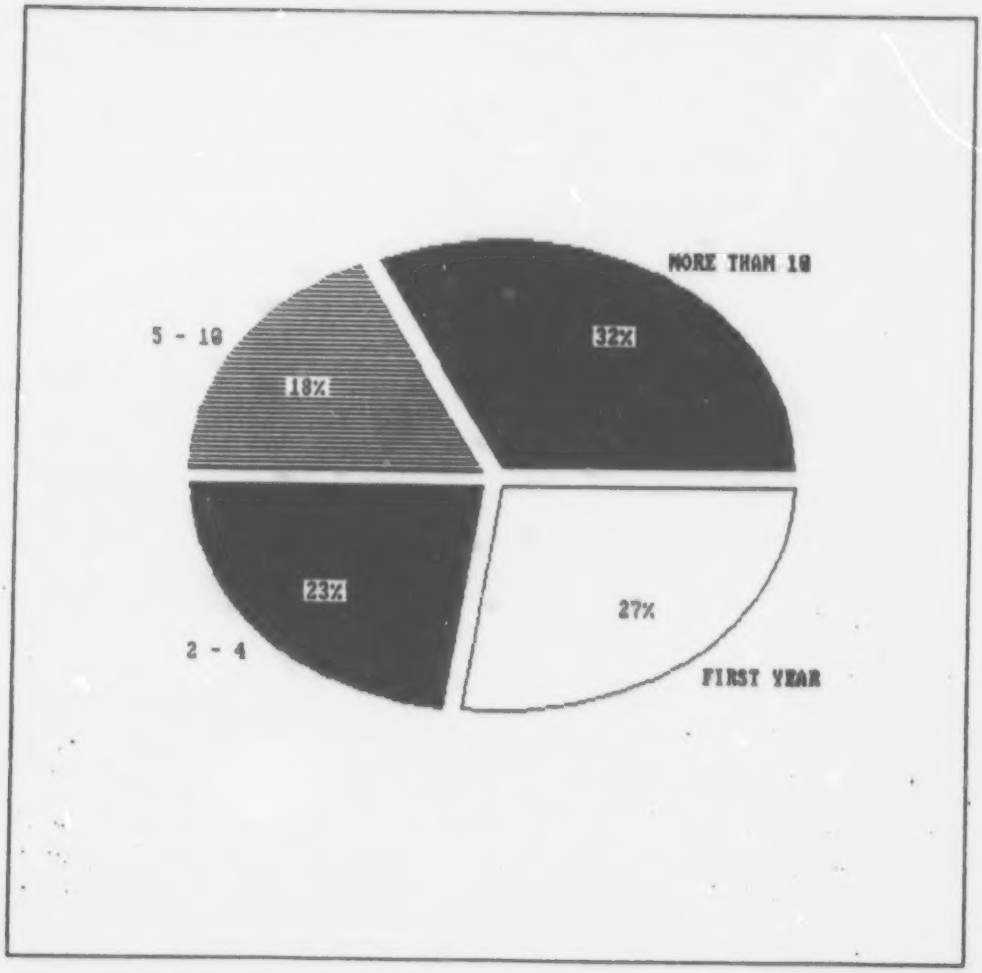


Figure 64. Number of Years Selling

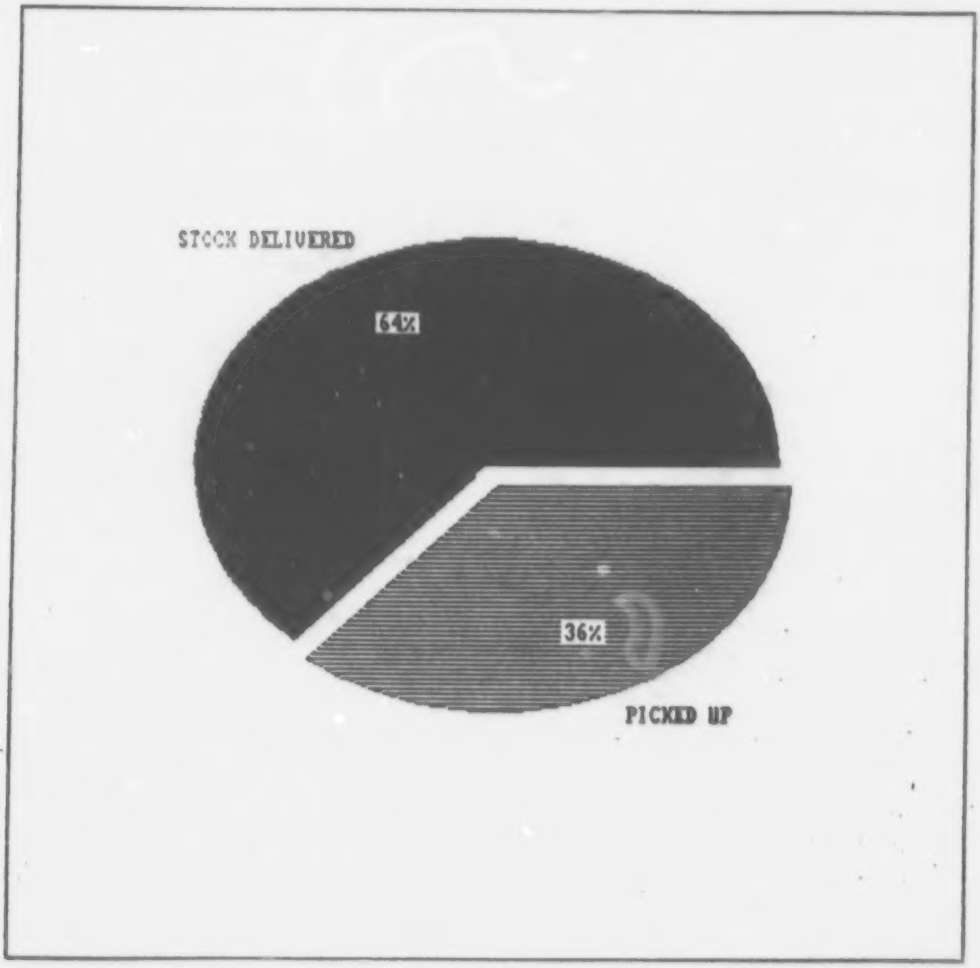


Figure 65. Retailer Supply Method

B. RETAILER MARKET OPINIONS

SCTGA & THE NATURAL TREE RETAILER

Figure 66, page IV-9, illustrates that 55% of respondent retailers were not aware that the SCTGA existed. This percentage is significant as personal visitations to Saskatoon & Regina showed that the majority of retailers were fully aware of the SCTGA, from the 1987 SCTGA Christmas Tree Market Study.

Alternatively, these results may prove beneficial providing increased retailer awareness of the SCTGA and its intentions.

Potential acceptance of SCTGA trees is relatively high amongst retailers, depending on price & quality (23% each). Forty-one percent (41%) stated that they would consider at least a partial replacement of their present source of trees. These results were confirmed during visitations to existing retailers in Saskatoon & Regina.

Figure 67, page IV-10, illustrates that the majority (67%) of retailers were happy with their tree wholesaler/supplier, while isolated examples of extremely poor quality trees and poor supplier/retailer business relationships resulted in 14% of retailers stating they will look for a new supplier next year.

Fourteen percent (14%) of respondents cut and retailed their own trees. This percentage may be construed as high due to 30% of respondents originating from the Forest Fringe zone.

Seventy-eight percent (78%) of the retailers rated their tree quality as good to excellent, and only 38% had to actually cull stock before or during the sales period (see Figures 68 & 69, pages IV-11 & IV-12). Based on the answers given in the survey and through personal interviews, retailers often prune off the tops or branches of poor quality stock in an attempt to make the trees more presentable to the consumer.

The majority (78%) of retailer respondents consider the artificial Christmas tree as doing very little harm to their business of selling natural Christmas trees (see Figure 70, page IV-13). No relationship was found between the number of trees sold per retailer and their respective responses to this question.

THE RETAILER & THE NATURAL TREE CONSUMER

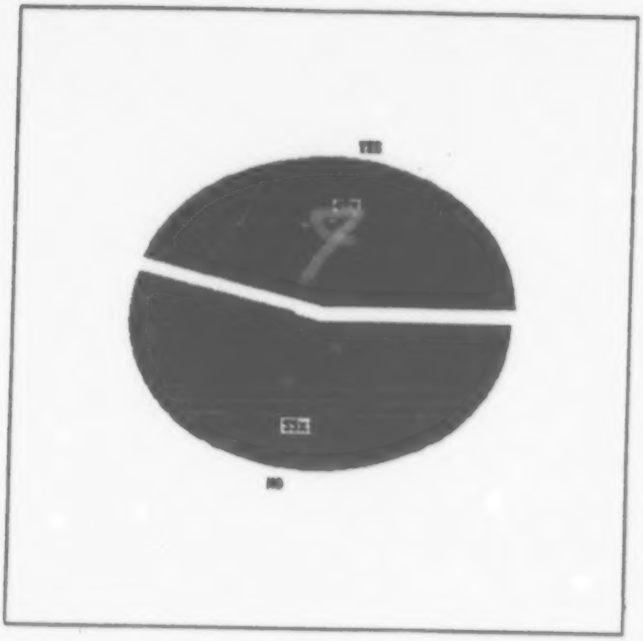
Figure 71, page IV-14, compares retailer thoughts on what the typical natural Christmas tree consumer looks for in a 'good' tree versus actual consumer desired tree characteristics (taken from Appendix II, page II-27). The form or shape of the natural tree offers the most substantial difference of opinion between the retailer and the consumer. Except for tree height, all other answers compare favorably. Two (2) consumer-desired tree characteristics not mentioned in the chart due to no similar retailer responses were:

- a straight trunk; and
- species.

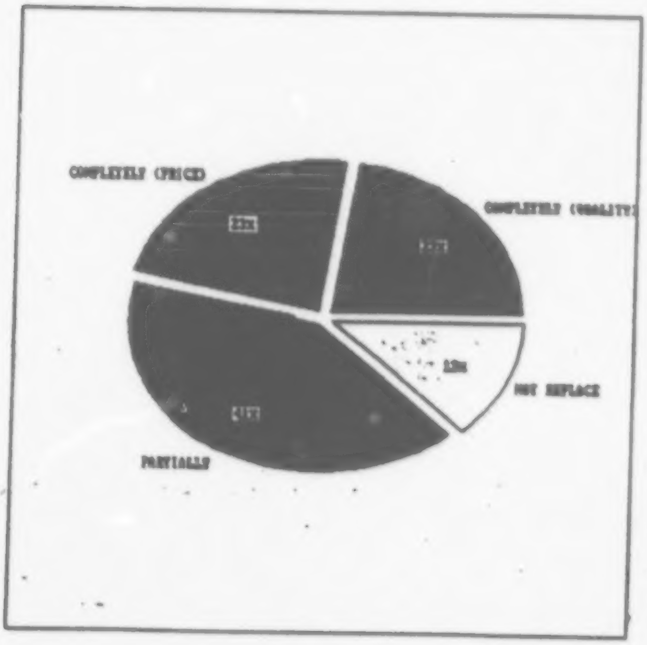
Generally, retailers felt that a standardized grading system for natural trees would be of at least some benefit to themselves, as well as to the consumer (see Figure 72, page IV-15).

Figure 73, page IV-16, illustrates retailer respondents choice ranking for a variety of natural Christmas tree characteristics which they look for in a quality tree. Clearly, form & freshness were the most common first choice, followed by freshness, colour & purchase price as their common second choices.

Figure 74, page IV-17, compares the retailers' choice ranking of tree species that they feel will be in high demand in the near future. White & Scots pine were the most common first & second choices made by the respondents to the survey.



Retailer Awareness of the SCTGA



Potential Acceptance of SCTGA Trees
Based on Competitive Price & Good Quality Stock

Figure 66. SCTGA & The Natural Christmas Tree Retailer

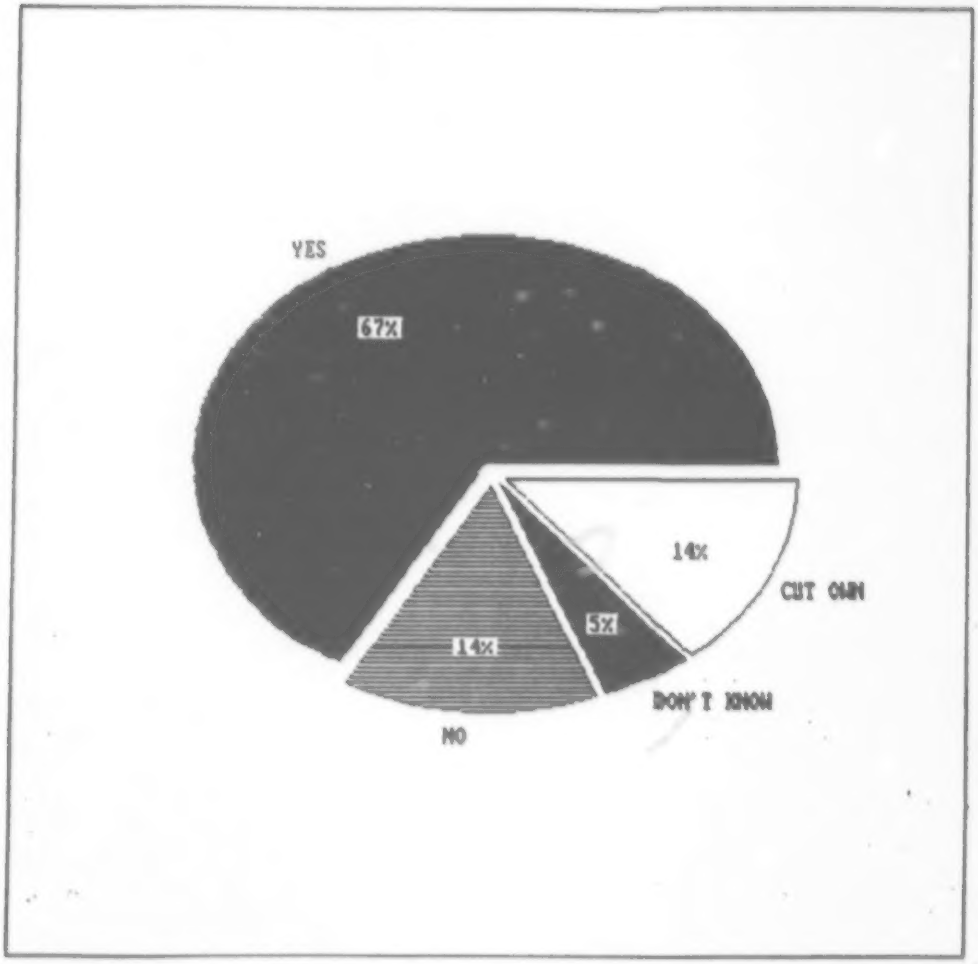


Figure 67. Retailer Source Preference for 1989

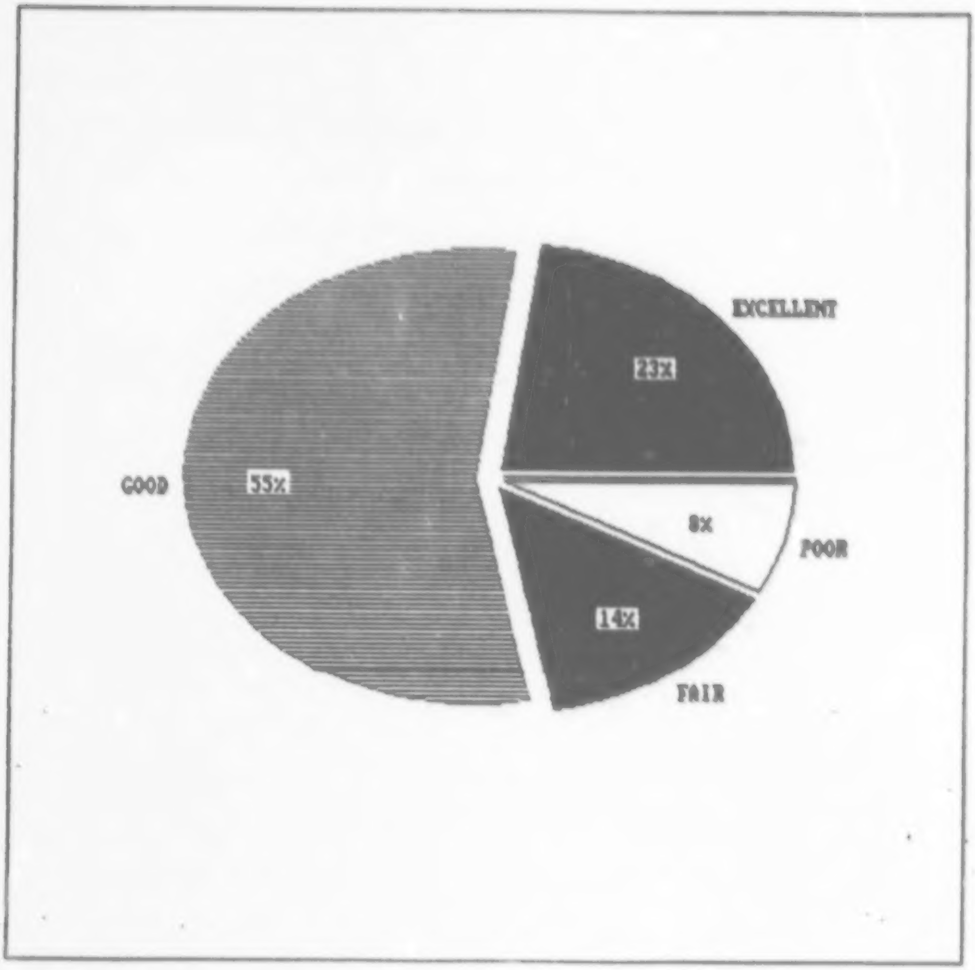


Figure 68. The Current Quality of Natural Christmas Trees

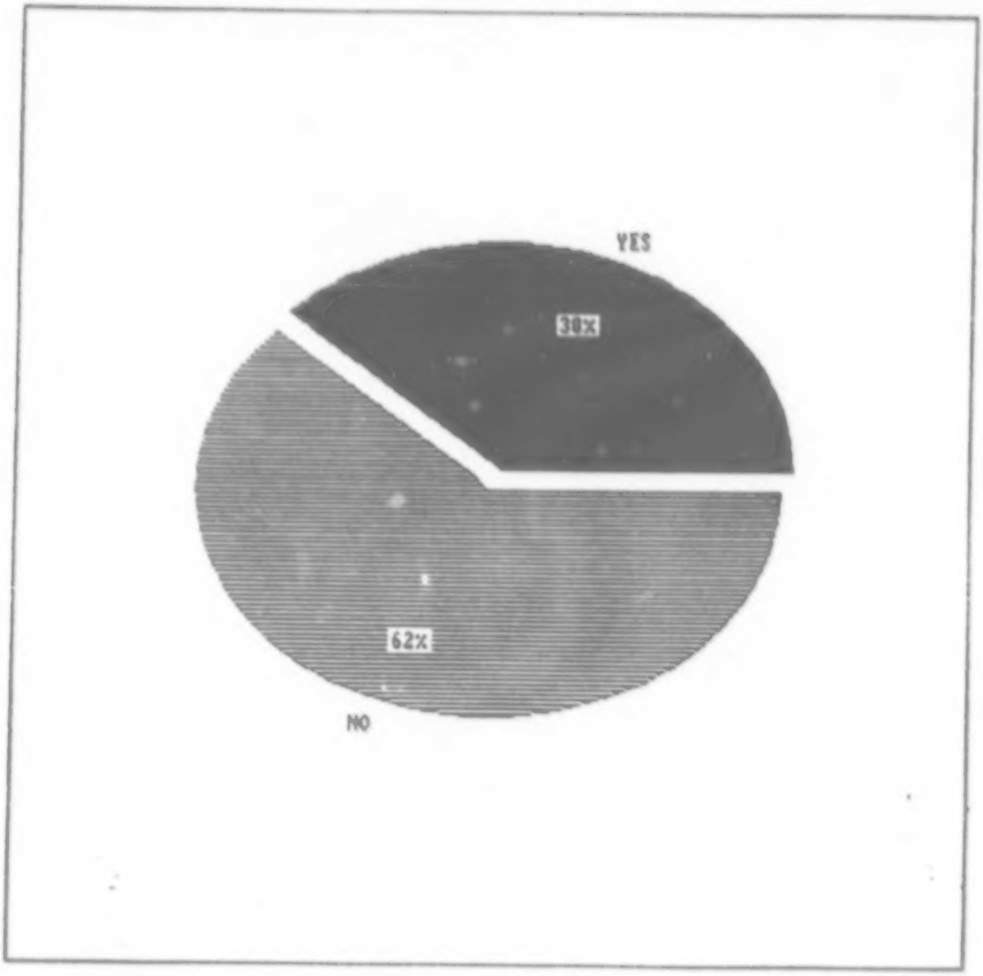


Figure 69. The Current Cull Ratio

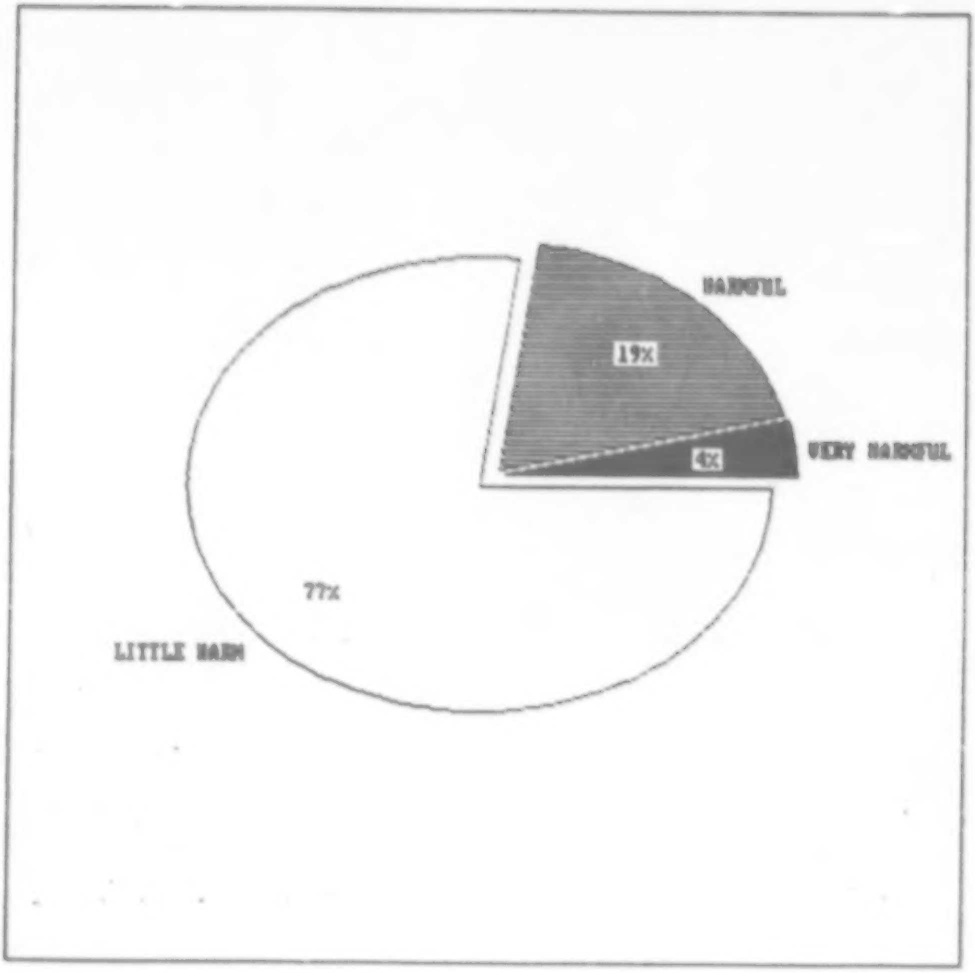


Figure 70. The Influence of the Artificial Tree Market

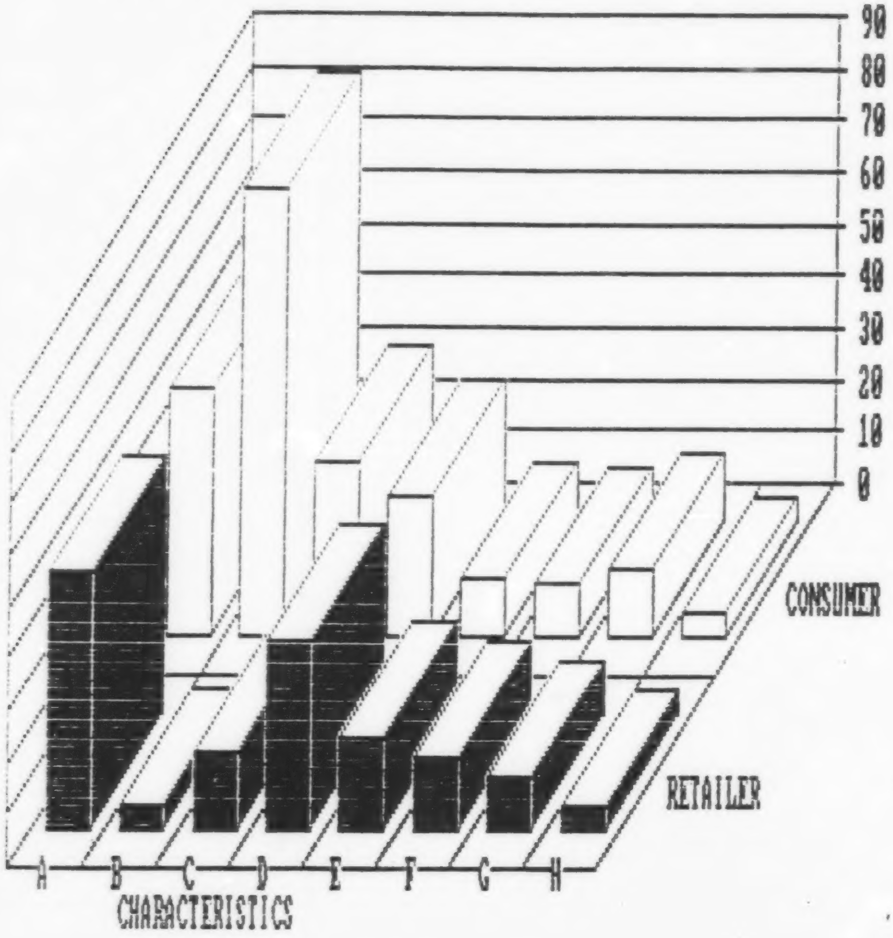


Figure 71. **Retailer Thoughts on Consumer Desired Tree Characteristics vs. Actual Survey Results**

LEGEND

A : FORM
B : FULLNESS
C : HEIGHT
D : FRESHNESS
E : NEEDLE RETENTION
F : PRICE
G : COLOUR
H : FRAGRANCE

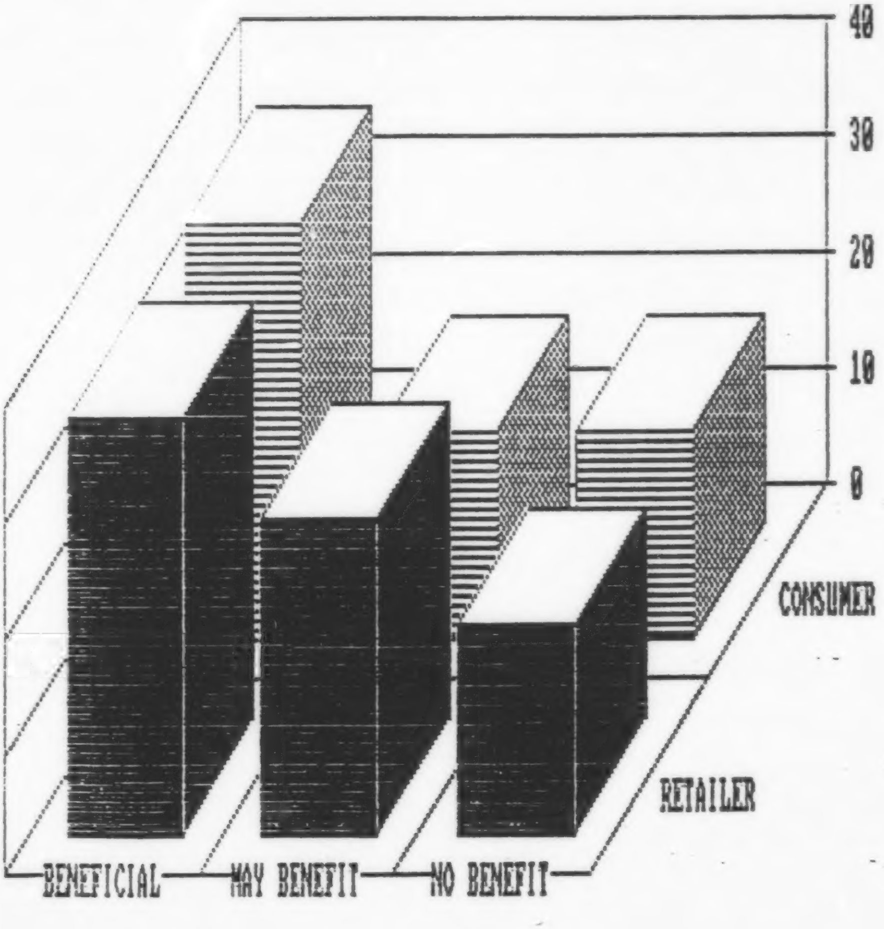


Figure 72. The Benefits of a Standardized Grading System

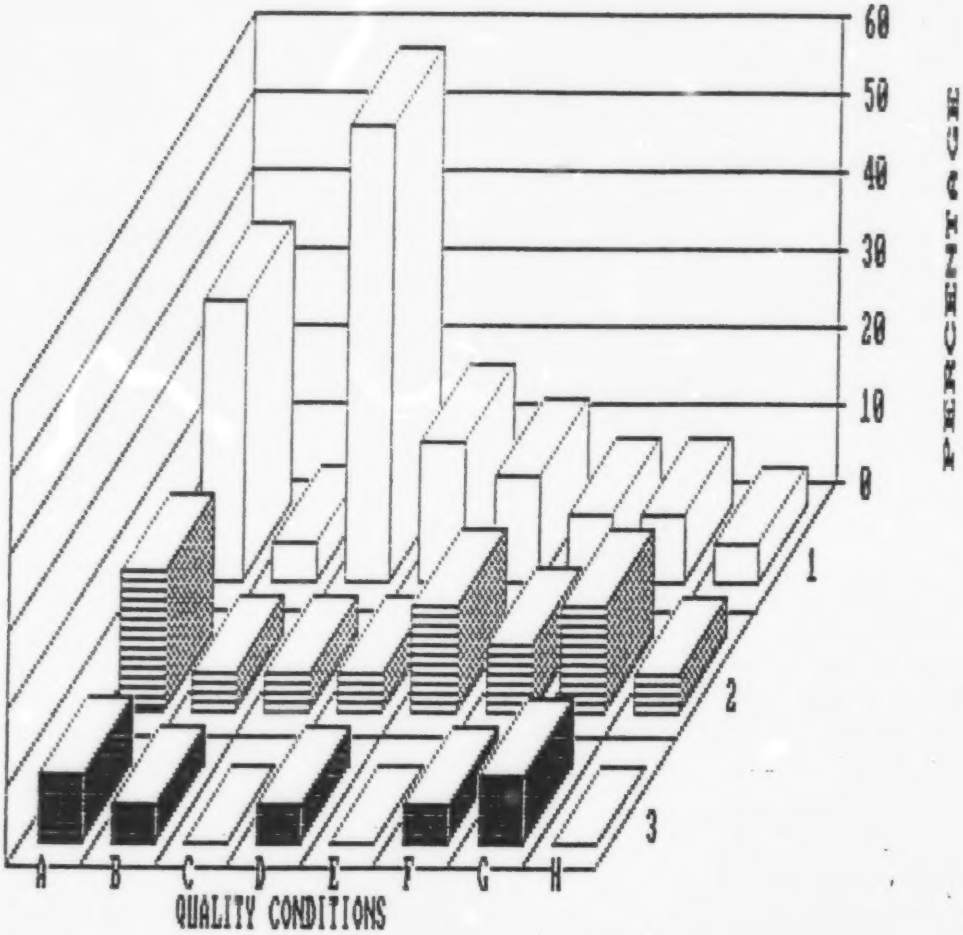


Figure 73. Christmas Tree Retailer Quality Preferences

LEGEND

1 : 1st CHOICE
2 : 2nd CHOICE
3 : 3rd CHOICE

A : FRESHNESS
B : FRAGRANCE
C : FORM
D : NEEDLE RETENTION
E : COLOUR
F : HEIGHT
G : PURCHASE PRICE
H : OTHER (FULLNESS)

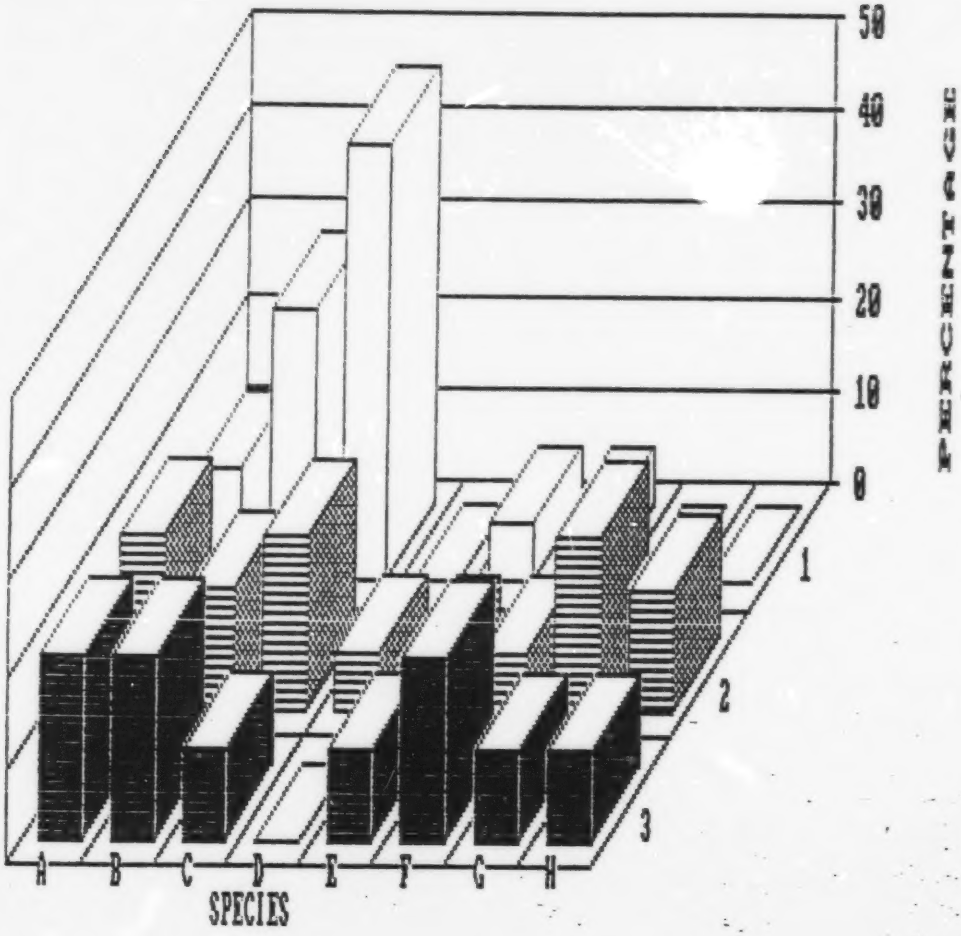


Figure 74. Species Preference for the Saskatchewan Consumer

LEGEND

1 : 1st CHOICE	A : DOUGLAS FIR
2 : 2nd CHOICE	B : SCOTS PINE
3 : 3rd CHOICE	C : WHITE PINE
	D : NORWAY PINE
	E : BALSAM FIR
	F : WHITE SPRUCE
	G : BLACK SPRUCE
	H : OTHER FIR

C. RETAILER MARKETING TECHNIQUES

Table 11 (below) lists common prices paid by retailers & consumers for various Christmas tree species across Saskatchewan. Diverse tree names not listed in this table include:

- Plantation Fir
- Cultured Pine
- Washington Wild Fir
- Premium Douglas Fir
- Grand Fir

Table 11. AVERAGE PRICES FOR CHRISTMAS TREES BY SPECIES

CHRISTMAS TREE TYPE	$ WHOLESALE PRICE	$ CONSUMER PRICE
B.C. FIR	5 - 10.00	9 - 25.00
BALSAM FIR	9 - 11.00	20 - 23.50
SCOTS PINE	16 - 18.00	21 - 35.00
SHEARED DOUGLAS FIR	8 - 18.00	15 - 37.50
SASK. WILD SPRUCE	4 - 6.00	10 - 15.00
SASK. WILD FIR	12.00	27.00
BLUE SPRUCE	20.00	30.00
WHITE PINE	18 - 24.00	30 - 39.00

The majority (74%) of respondents did not offer any free gifts while selling trees at their lot locations (see Figure 75, page IV-21). However, some typical free gifts that were given at the point of sale included candy canes, and occasionally, an extra tree. Figure 76, page IV-22, illustrates a host of additional items that were sold at tree lots across Saskatchewan. Tree stands, tree bags, wreaths & ornaments were the most commonly retailed items.

Approximately 41% of respondents failed to offer general information relating to Christmas tree set-up, safety & maintenance information (see Figure 77, page IV-23).

Sixty-six percent (66%) of respondents spent less than 10% gross revenue on advertising techniques such as newspapers, television & posters (see Figure 78, page IV-24).

Table 12 (below) summarizes the number of advertisements and natural tree retailers found within the daily & weekly newspapers listed in Appendix I, page I-5, between November 28th & December 24th/88. No advertisements were found in the weekly newspapers of any of the towns reviewed.

Table 12. RETAILER NEWSPAPER ADVERTISEMENTS

TIME PERIOD	TOTAL NO. OF ADVERTISEMENTS			NO. OF RETAILERS ADVERTISING		
	P.A.	SASKATOON	REGINA	P.A.	SASKATOON	REGINA
NOV. 28 - DEC. 3	10	0	0	3	0	0
DEC. 5 - DEC. 10	25	15	4	7	4	2
DEC. 12 - DEC. 17	37	16	1	11	5	1
DEC. 19 - DEC. 24	10	0	0	3	0	0

This Table shows that the peak advertising period for retailer seems to lie between the second and third week before Christmas. Figure 79, page IV-25, illustrates this as being the most common peak sales period indicated by retailers.

Table 13 lists the actual locations of each advertisement within the newspaper. The most common advertisement was found in the classified section with a small illustration of a Christmas tree.

Table 13. LOCATION OF ADVERTISEMENTS WITHIN THE NEWSPAPERS

LOCATION	LOCATION OF ADVERTISEMENTS		
	MAIN SECTION	CLASSIFIEDS	
		ILLUSTRATIONS	NO ILLUSTRATIONS
PRINCE ALBERT	0	44	40
SASKATOON	3	0	25
REGINA	5	0	0

There was a noticeable trend towards not advertising retailing businesses. The reasons for the lack of advertising in Saskatoon & Regina newspapers was disclosed during personal visitations to the respective cities. By refraining from advertising, the retailer avoided paying the temporary business license fee associated with selling Christmas trees.

Figure 80, page IV-26, illustrates some additional techniques which retailers use to generate increased sales.

A review of Saskatchewan City Halls, itinerant retailer lists indicates that the Taxation & Business Licensing Departments were often unaware of many tree retailers, often admitting to this fact. Commonly, charitable organizations were exempted from the licensing requirements of the City.

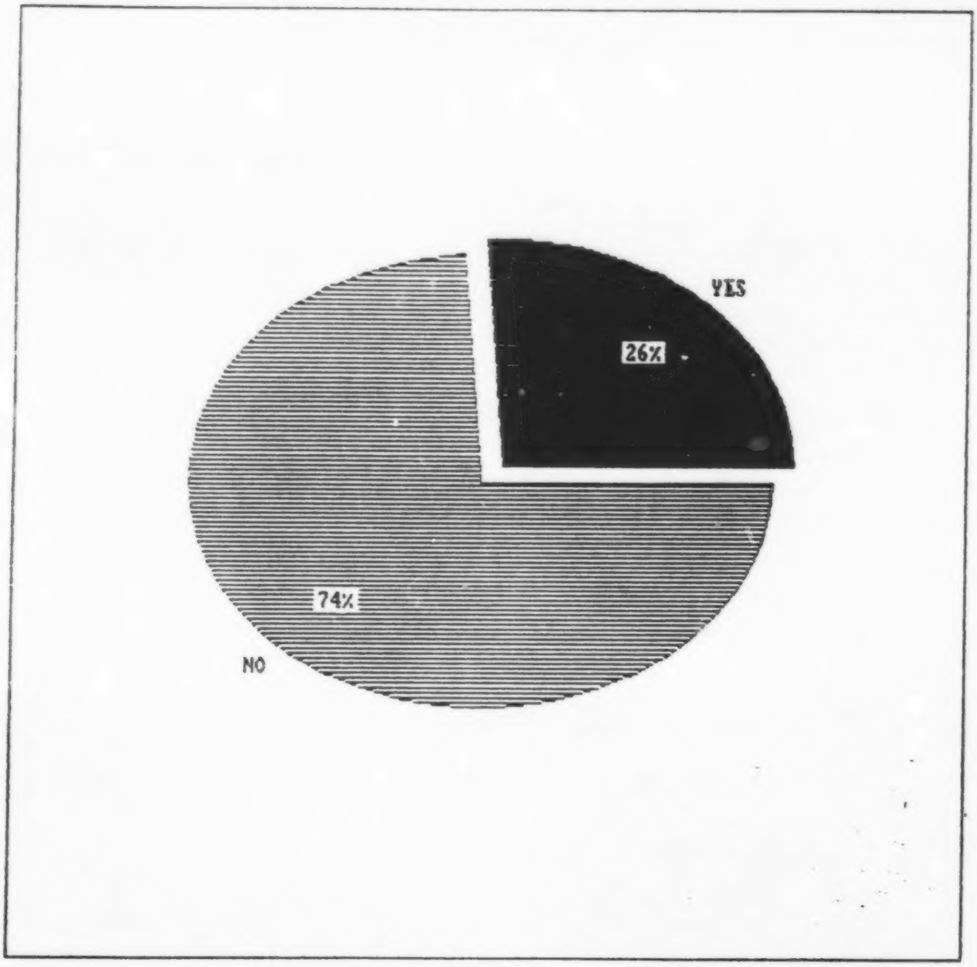


Figure 75. Offer a Free Gift

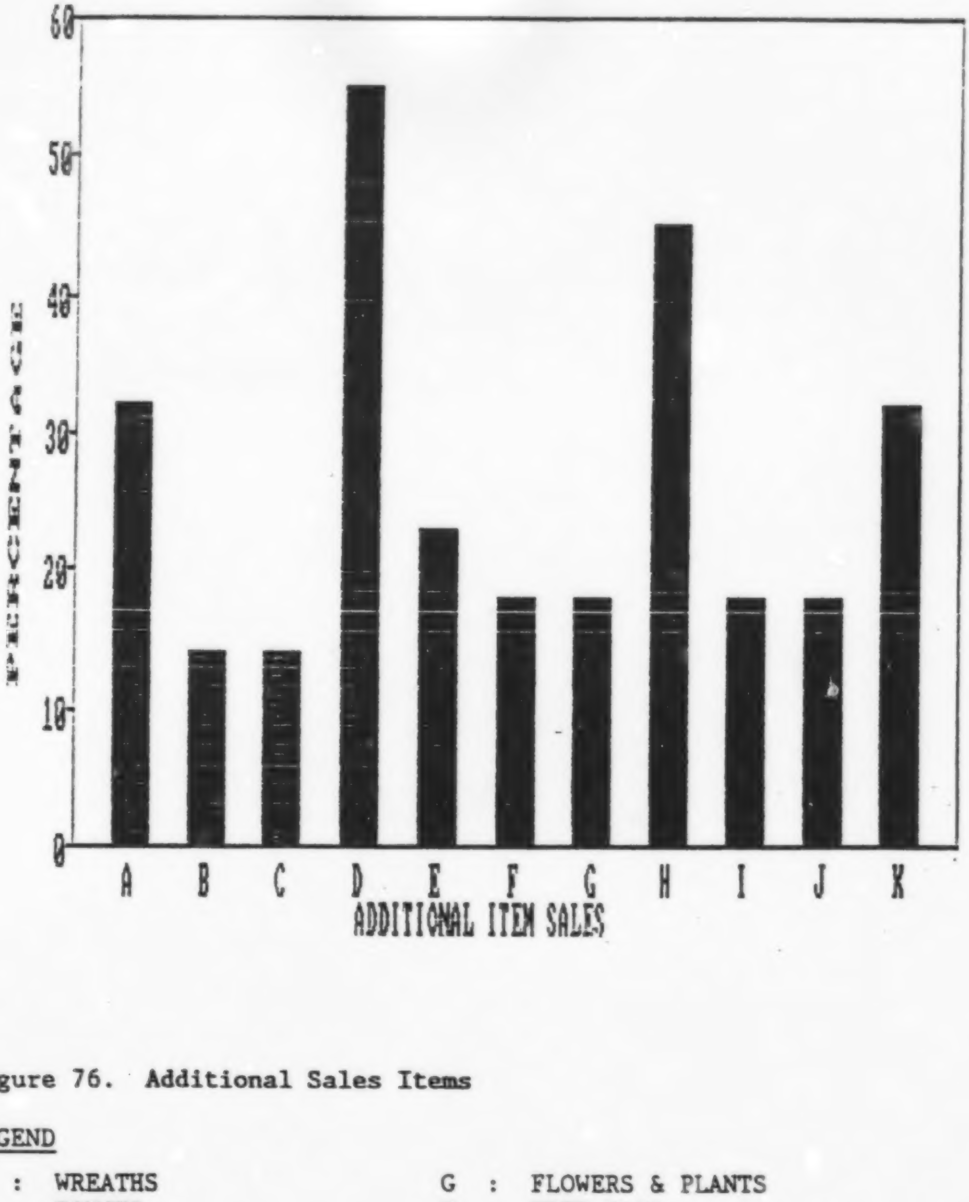


Figure 76. Additional Sales Items

LEGEND

A : WREATHS
B : BOUGHS
C : CONES
D : TREE STANDS
E : TREE ORNAMENTS
F : CHRISTMAS LIGHTS
G : FLOWERS & PLANTS
H : TREE BAGS
I : ARTIFICIAL TREES
J : OTHER (FIREWOOD, CRAFTS, NURSERY STOCK, CATALOGUES
K : CHRISTMAS TREES ONLY

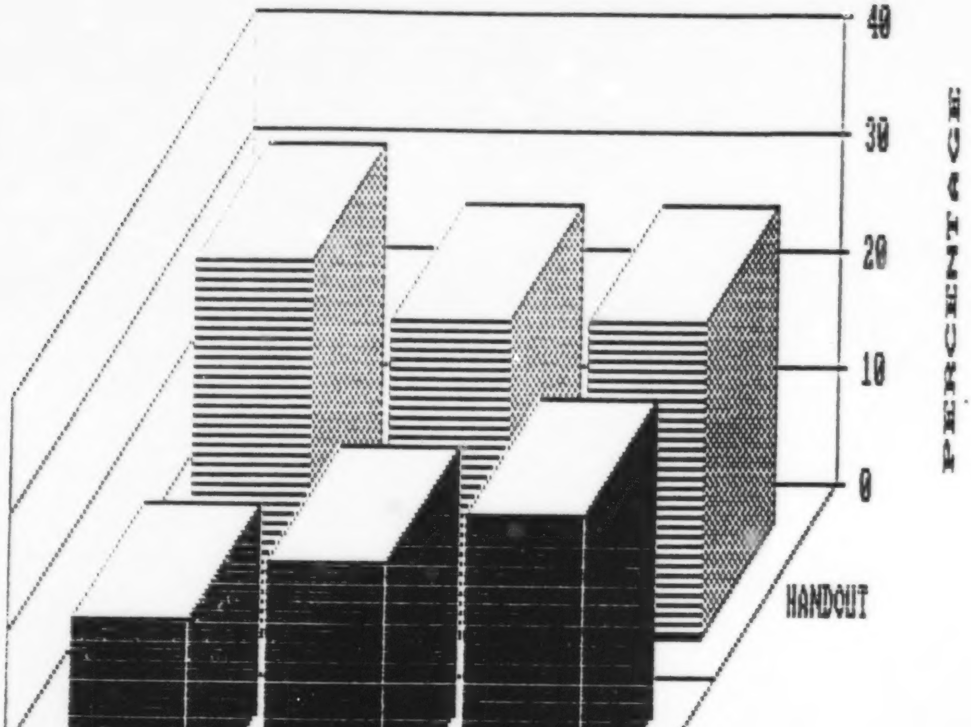


Figure 77. Christmas Tree Information Tips to Customers

LEGEND

A : CHRISTMAS TREE SET-UP
B : CHRISTMAS TREE SAFETY
C : CHRISTMAS TREE MAINTENANCE
* : 41% OF RETAILERS PROVIDE NO INFORMATION

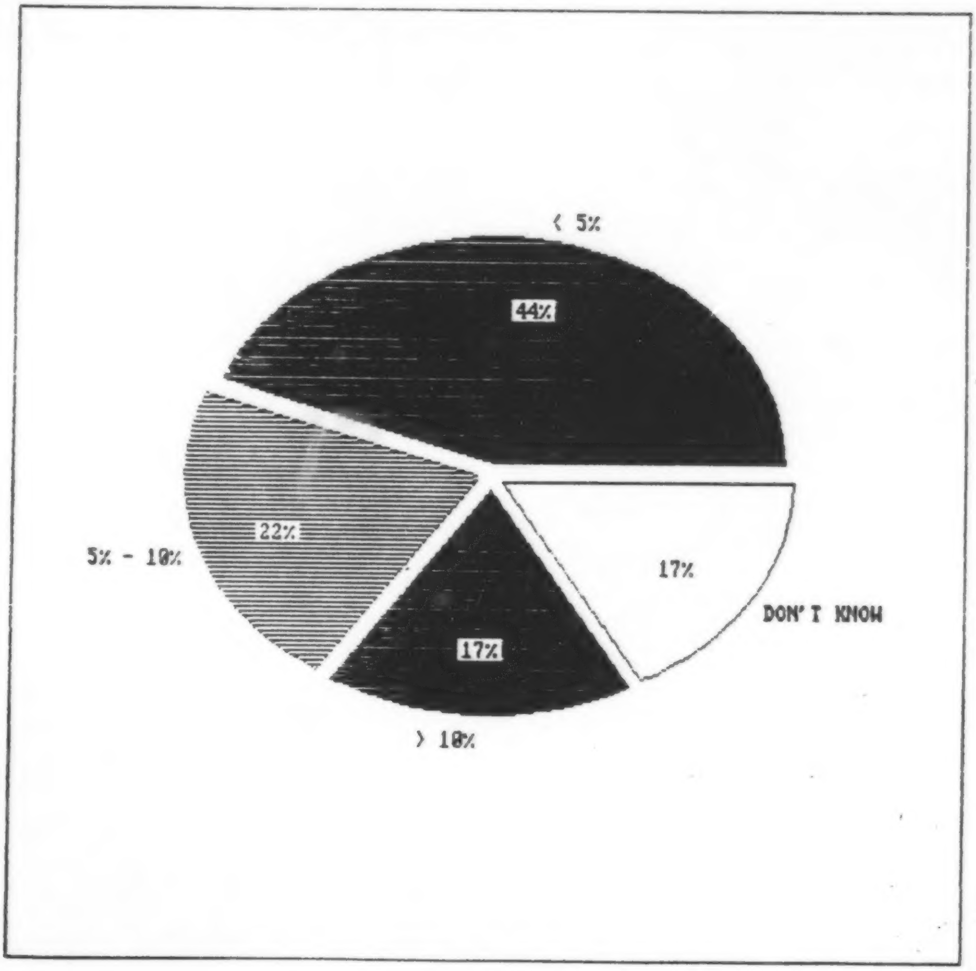


Figure 78. **Estimates of Gross Revenue Spent on Promotion**

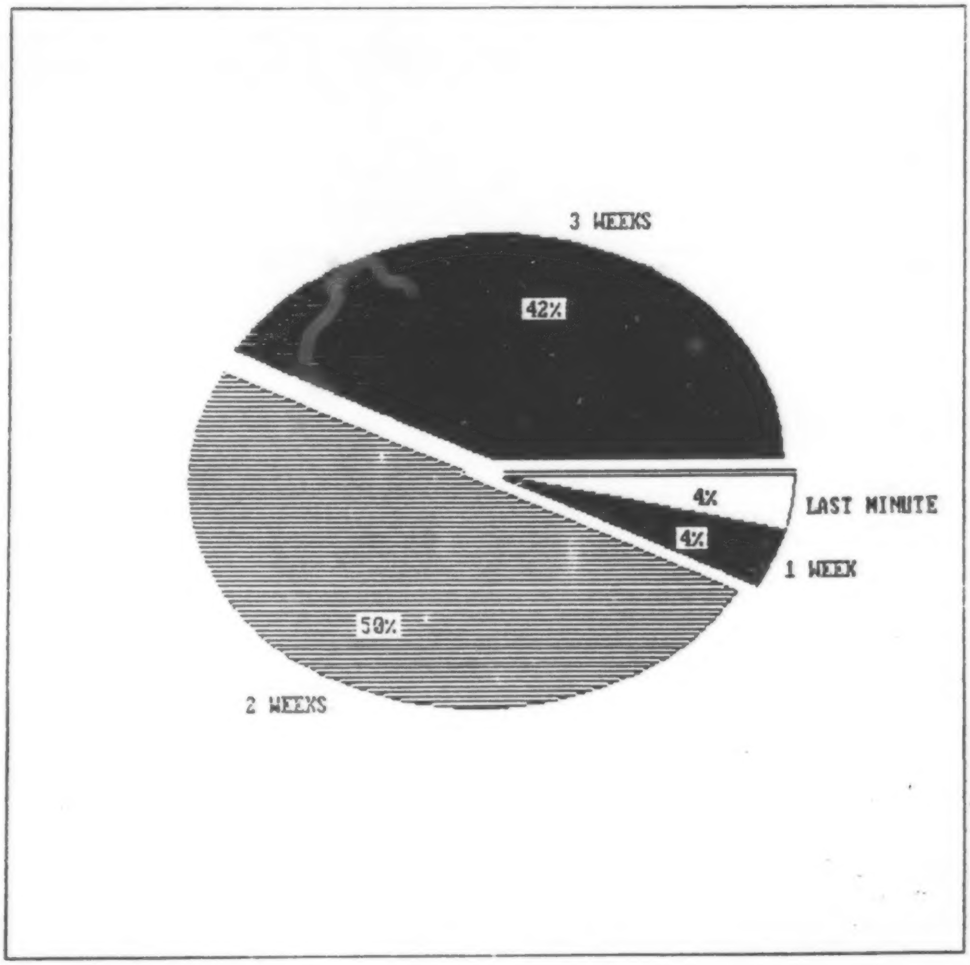


Figure 79. Peak Sales Period

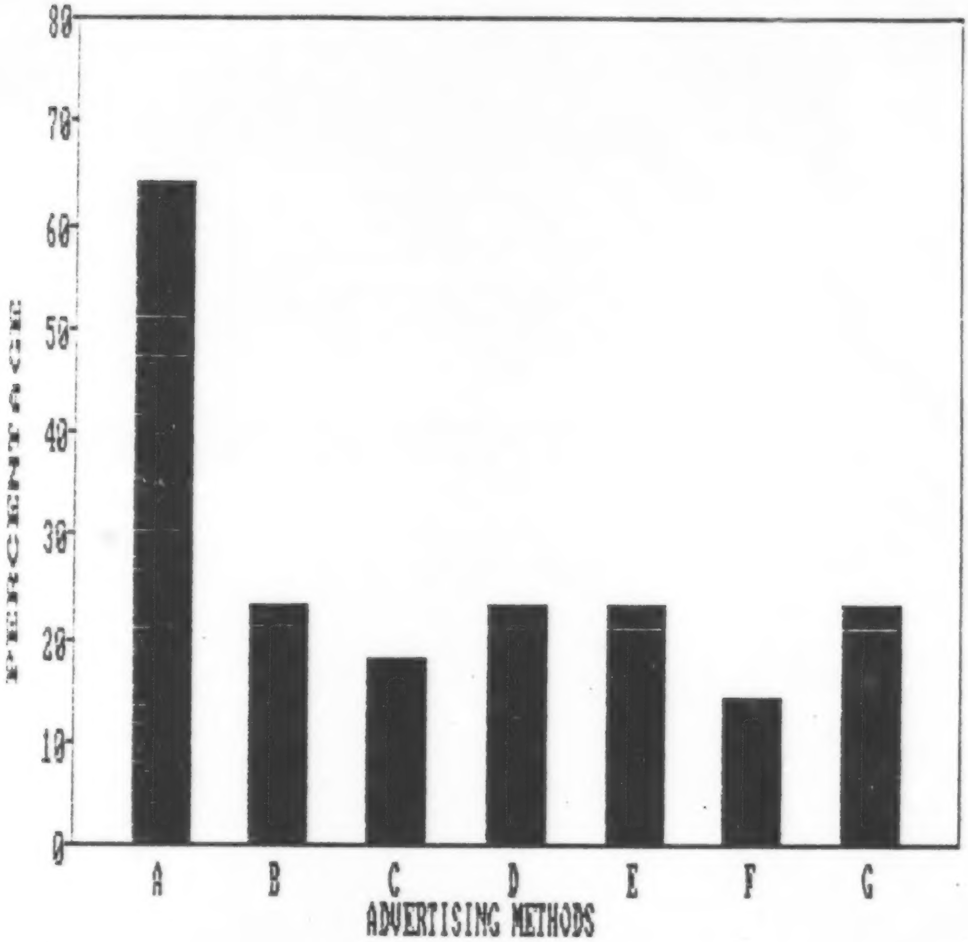


Figure 80. **Advertising Techniques**

LEGEND

A : NEWSPAPER/MAGAZINE
B : TELEVISION
C : IN-DOOR SHOWROOM
D : POSTERS
E : RADIO
F : BILLBOARD
G : NONE

D. LIST OF CONFIRMED 1988 NATURAL CHRISTMAS TREE RETAILERS IN SASKATCHEWAN

The following Section is a detailed list of confirmed natural Christmas tree retailers in Saskatchewan. This list is non-exhaustive, as not all towns were investigated for retailers. However, this list should provide invaluable contact information for the SCTGA, by identifying most, if not all, major (>2,000 tree) retailers.

The list (labelled Figure 81, pages IV-28 - IV-35) is the summation of part of the Research & Design Sections of this Study (Appendix I, Sections A & B).

All retailers expressing a keen interest for more information about the SCTGA this year, and interest also in obtaining trees from the SCTGA in the near future, are identified accordingly.

The SCTGA should seriously consider sending general information about its association to every questionnaire respondent.

Figure 81. **Saskatchewan Christmas Tree Retailers**

1. SASKATOON RETAILERS

Louis David BERGEY
7-410 Central Avenue
SASKATOON, Saskatchewan
S7N 2G1

Ray M. CHOMYN
133 Acadia Court
SASKATOON, Saskatchewan
S7H 4C4

DUNDONALD SCOUTING ASSOCIATION
118 Sumner Crescent
SASKATOON, Saskatchewan
S7L 9Z7

**GOLDEN TREES
(see Regina)

Shelly ELLSON
1722 Alexandra Avenue
SASKATOON, Saskatchewan
S7K 3L5

FOREST GROVE COMMUNITY CHURCH
502 Webster Street
SASKATOON, Saskatchewan
S7N 3P9

Mr. Golruze TAEF
204 - 10740 112th Street
EDMONTON, Alberta
T5H 3H1

**WALBRO HOLDINGS LTD.
1030 Louise Avenue
SASKATOON, Saskatchewan
S7H 2P6

YMEN'S CLUB OF SASKATOON
25 - 22nd Street East
SASKATOON, Saskatchewan
S7K 0C9

Mr. Ewan MacDONALD
P.O. Box 7882
SASKATOON, Saskatchewan
S7K 4R6

Mr. Clayton LAFRAMBOISE
342 Montreal Rd. South
SASKATOON, Saskatchewan
S7M 3L1

Mr. Bob MacDONALD
(no confirmed address)

SASKATOON COVERED FARMS
C/o Keith CLEMMENT
#19 213 East Place
SASKATOON, Saskatchewan
S7J 3L9

Gary & Bill MALOFF
511 - 3rd Avenue North
SASKATOON, Saskatoon

DUTCH GROWERS GARDEN CENTRE
Attn: Mr. Harry VAN DUYRENDYK SR.
1818 Central Avenue
SASKATOON, Saskatchewan
S7N 2Z2

Mr. Dave KORINETZ
1119 5th Street East
SASKATOON, Saskatchewan
S7H 1H4

*CANADIAN TIRE ASSOCIATE STORE
Circle Park Mall
Attn: The Manager
3310 8th Street East
SASKATOON, Saskatchewan
S7H 5M3

ON-THE-SPOT DRYCLEANERS
Attn: Mr. Ken HILSENTEGER
205 33rd Street West
SASKATOON, Saskatchewan
S7L 0V2

*Mr. Chris BROWN
C/o Ag-Comm. Consulting &
Irrigation Ltd.
P.O. Box 8250
SASKATOON, Saskatchewan
S7K 6C5

**MAYFAIR HARDWARE
Attn: Mr. Bob McHARGUE
203 - 33rd Street West
SASKATOON, Saskatchewan
S7L 0V2

Dave & Lana ABRAHAMSON
1030 Avenue M South
SASKATOON, Saskatchewan
S7M 2L9

**SASKATCHEWAN WHEELCHAIR SPORTS
ASSOCIATION
Attn: Mrs. Beverley DILLON
2310 Louise Avenue
SASKATOON, Saskatchewan
S7J 2C7

2. REGINA RETAILERS

UNIQUE CHRISTMAS TREES
Attn: Mr. Bob PEPRI
467 Broad Street North
REGINA, Saskatchewan
S4R 2X8

**GOLDEN TREES
Attn: Mr. Denis EDMONDS
P.O. Box 3592
REGINA, Saskatchewan
S4P 3L7

**Y-MEN'S CLUB
Attn: Mr. Stan MORSE
C/o STC Lines
2041 Hamilton Street
REGINA, Saskatchewan
S4P 2E2

THE REGINA LEADER POST
Circulation Department
Attn: Mr. Cy VANDERVIL
1964 Park Street
REGINA, Saskatchewan
S4P 3G4

CANADIAN TIRE ASSOCIATE STORE
North Side Store
Attn: The Manager
601 Albert Street
REGINA, Saskatchewan
S4R 2P4

Mr. Marcus JOPP
(see Moose Jaw)

3. MOOSE JAW RETAILERS

*EVANS FLORIST LTD.
Attn: The Manager
17 High Street West
MOOSE JAW, Saskatchewan
S6H 1S4

Mr. Marcus JOPP
RADIUM HOT SPRINGS, B.C.

MR. OMER SUDDER
C/o Country Boy Furniture
1021 Corman Crescent
MOOSE JAW, Saskatchewan
S6H 6V5

BOY SCOUT ASSOCIATION
(address unconfirmed)

**KIWANIS CLUB OF MOOSE JAW
Attn: Mr. Doug ARMITAGE
1107 Grayson Crescent
MOOSE JAW, Saskatchewan
S6H 3E9

CANADIAN TIRE ASSOCIATE STORE
Attn: The Manager
1350 Main Street North
MOOSE JAW, Saskatchewan
S6H 3L2

**Mr. Louis CARROBOURG
P.O. Box 178
GRAVELBOURG, Saskatchewan
S0H 1X0

Mr. Joel LARAGE (Santa's Forest)
1221 Redland Avenue
MOOSE JAW, Saskatchewan
S6H 3P5

4. PRINCE ALBERT RETAILERS

*JOHN'S NURSERY & MARKET GARDEN
Attn: The Manager
HENRIBOURG, Saskatchewan
S0J 1C0

*Mr. Otto BOETTCHER
1359 River Street East
PRINCE ALBERT, Saskatchewan
S6V 0B8

MANAGER/CHRISTMAS TREE RETAILER
383 River Street West
PRINCE ALBERT, Saskatchewan
S6V 2Z3

Mr. Tom HISLOP
1427 River Street East
PRINCE ALBERT, Saskatchewan
S6V 0B9

**HUSKY HOUSE
Attn: The Manager
1550 6th Avenue East
PRINCE ALBERT, Saskatchewan
S6V 5W4

**CRESCENT IGA
Attn: Mr. Brian BASARUDA
635 Branion Drive
PRINCE ALBERT, Saskatchewan
S6V 2R9

CARLTON COURT TREES
Attn: Christmas Tree Retailer
PRINCE ALBERT, Saskatchewan
S6V 6Z6

Mr. Ernie SAUVE
C/O Betty's Garden Centre
3590 6th Avenue West
PRINCE ALBERT, Saskatchewan

Mr. Jim DAVIES
(address unconfirmed)
BURNABY, British Columbia

Mr. Jim INGOLDSBY
1661 Olive Diefenbaker Drive
PRINCE ALBERT, Saskatchewan
S6V 7V9

Brad & Andrea GAYOWSKI
2805 6th Avenue East
PRINCE ALBERT, Saskatchewan
S6V 6Z5

TELEMIRACLE

WHISPERING PINES TRAILER COURT
(address unconfirmed)

PRINCE ALBERT, Saskatchewan

Mr. Dennis GRAVEL
P.O. Box 1991
PRINCE ALBERT, Saskatchewan
S6V 6Z1

Mr. Ron MURPHY
833 1st Street East
PRINCE ALBERT, Saskatchewan
S6V 0C3

5. SWIFT CURRENT RETAILERS

GOLDEN TREES
(see Regina)

CANADIAN TIRE ASSOCIATE STORE
Plaza Shopping Centre
Attn: The Manager
306 Central Avenue North
SWIFT CURRENT, Saskatchewan
S9H 0L4

ELMWOOD GROCERY
Attn: Mr. Cal SCHINDEL
936 Chaplin East
SWIFT CURRENT, Saskatchewan
S9H 1J7

SWIFT CURRENT TURBO SERVICE
Attn: The Manager
710 Central North
SWIFT CURRENT, Saskatchewan
S9H 0MS

FRONTIER TEXACO SERVICE
Attn: Mr. Yewling CHAN
C/o 419 Colonel Otter Drive
SWIFT CURRENT, Saskatchewan
S9H 4P4

SWIFT CURRENT KIWANIS CLUB
Attn: Mr. Ted LIGHTFOOT
1101 Riverview Crescent
SWIFT CURRENT, Saskatchewan
S9H 1Y8

6. YORKTON RETAILERS

**GOLDEN TREES
(see Regina)

YORKTON TURBO GAS BAR
Parkland Mall
299 - 277 Broadway Street East
YORKTON, Saskatchewan
S3N 1G7

*YOUNGS'S PLANT WORLD
P.O. Box 161
YORKTON, Saskatchewan
S3N 2V7

Phone: (306) 783-8660

YORKTON CO-OPERATIVE ASSOCIATION LTD.
Farm Service Supply Centre
81 Beck Avenue
YORKTON, Saskatchewan
S3N 2V7

PETRO-CAN SERVICE STATION
(for Yorkton Optimist Club)
300 Broadway Street West
YORKTON, Saskatchewan
S3N 0N6

CHEN'S CENTRAL GROCETERIA LTD.
182 Broadway Street West
YORKTON, Saskatchewan
S3N 0M7

K-MART CANADA LTD.
Note: Trees sold annually by:
Mr. Bruce BOLTON
R.R. #7
VERNON, British Columbia
V1T 7Z3

7. NORTH BATTLEFORD RETAILERS

*CANADIAN TIRE ASSOCIATE STORE
(Selling for the Optimist Club)
Attn: The Manager
11802 Railway East
NORTH BATTLEFORD, Saskatchewan
S9A 3P7

WOOLWORTH DEPARTMENT STORE
Attn: The Manager
11434 Railway East
NORTH BATTLEFORD, Saskatchewan
S9A 3G8

Mr. Darryl BOSSAER
P.O. Box 339
NORTH BATTLEFORD, Saskatchewan
S9A 2Y3

Mr. Calvert IVERSON
10102 Campbell Crescent
NORTH BATTLEFORD, Saskatchewan
S9A 3S4

8. ESTEVAN RETAILERS

Mr. L. BOEY
1914 Wellock Road
ESTEVAN, Saskatchewan
S4A 1X5

*ESTEVAN KINSMEN CLUB
Attn: Mr. Richard SEIPP
2311 Victory Road
ESTEVAN, Saskatchewan
S4A 1Y3

CANADIAN TIRE ASSOCIATION STORE
Attn: The Manager
909 13th Avenue
ESTEVAN, Saskatchewan
S4A 2L9

9. WEYBURN RETAILERS

WEYBURN YOUNGFELLOW'S CLUB
(address unconfirmed)

10. LLOYDMINSTER RETAILERS

GREENSTREET RECREATION ASSOCIATION
C/o George Payne
R.R.#2, Box 4-14
LLOYDMINSTER, Saskatchewan
S9V 0X7

Jackie & Robert Richards
P.O. Box 51
MARSHAL, Saskatchewan
S0M 1R0

CANADIAN TIRE STORES
Attn: The Manager
3606 50th Avenue
LLOYDMINSTER, Alberta
T9V 0V7

KINSMEN CLUB
C/o Mr. Glen MASON
3204 55th Avenue
LLOYDMINSTER, Alberta
T9V 1S6

11. MELFORT RETAILERS

GEORGES HARDWARE
312 Main Street
MELFORT, Saskatchewan

12. MELVILLE RETAILERS

Unknown

13. KINDERSLEY RETAILERS

KINDERSLEY KINSMEN CLUB
P.O. Box 522
KINDERSLEY, Saskatchewan
S0L 1S0

*Diane TOWNSEND
P.O. Box 699
KINDERSLEY, Saskatchewan
S0L 1S0

CANADIAN TIRE ASSOCIATE STORE
Attn: The Manager
604 - 12th Avenue East
KINDERSLEY, Saskatchewan
S0L 1S0

14. MEADOW LAKE RETAILERS

Unknown

15. ASSINIBOIA RETAILERS

**KINSMEN CLUB OF ASSINIBOIA
Attn: The President
P.O. Box 716
ASSINIBOIA, Saskatchewan
S0H 0B0

16. OTHER RETAILERS

**PARADISE HILL FARM SUPPLIES
P.O. Box 118
ST. WALBURG, Saskatchewan
S0M 2G0

*** Questionnaire Respondent**
**** Questionnaire Respondent expressed interest in SCTGA**

APPENDIX V

EXPORT/IMPORT ANALYSIS

INTRODUCTION

This Appendix deals strictly with Canadian natural Christmas tree export and import data, obtained from Statistics Canada records (1976 - 1987).

A. CANADIAN NATURAL CHRISTMAS TREE EXPORT ANALYSIS

Over the past decade, Canada has supplied natural Christmas trees to a diverse overseas market. Countries as far away as Australia have imported Canadian trees.

The export potential appears to have been stable and actually increasing as an economically viable product in the mid-seventies. Many of the countries listed in the following statistical section were importing a substantial number of trees, on an annual basis, with ever increasing revenues returning to Canada.

However, it appears the world's economic strife in the 80's has altered the market share to one client only. Other than the United States, the countries listed have either reduced imports (some have been completely discontinued) or purchased Canadian trees at a reduced rate.

The mainstay of the potential and actual export market has been & will continue to be the United States. Of the 2,028,109 trees exported in 1976, approximately 94% were sold to the U.S. The unit price per individual stem was $1.83. In 1987, the States imported 2,702,257 trees (96% of the total Canadian export) at a unit price of $9.34. On the average, an additional 72,000 Christmas trees each year have been exported to the United States.

The only reliable estimate of Saskatchewan exports to the United States was acquired from Statistics Canada. A volume of 4,991 stems were exported to the States in 1987. There is a good possibility that even this small number may have come from a province other than Saskatchewan. (See Table 16, page V-9).

The following Table 14 and Figure 82, page V-3, summarizes the export statistics:

Table 14. NATURAL CHRISTMAS TREE EXPORT SUMMARY

YEAR	TOTAL EXPORTS	AMERICAN IMPORTS	GROSS REVENUE (1000'S)	AVERAGE $/UNIT
1976	2028109	1910482	3724	1.83
1977	2121951	1914211	4399	2.07
1978	2170994	1996318	5632	2.59
1980	2321224	2202802	9381	4.04
1981	2330640	2154412	11244	4.82
1982	2409558	2326298	14265	5.92
1985	2747335	2609027	21733	7.91
1986	2717131	2604403	23478	8.64
1987	2811934	2702257	25234	8.97

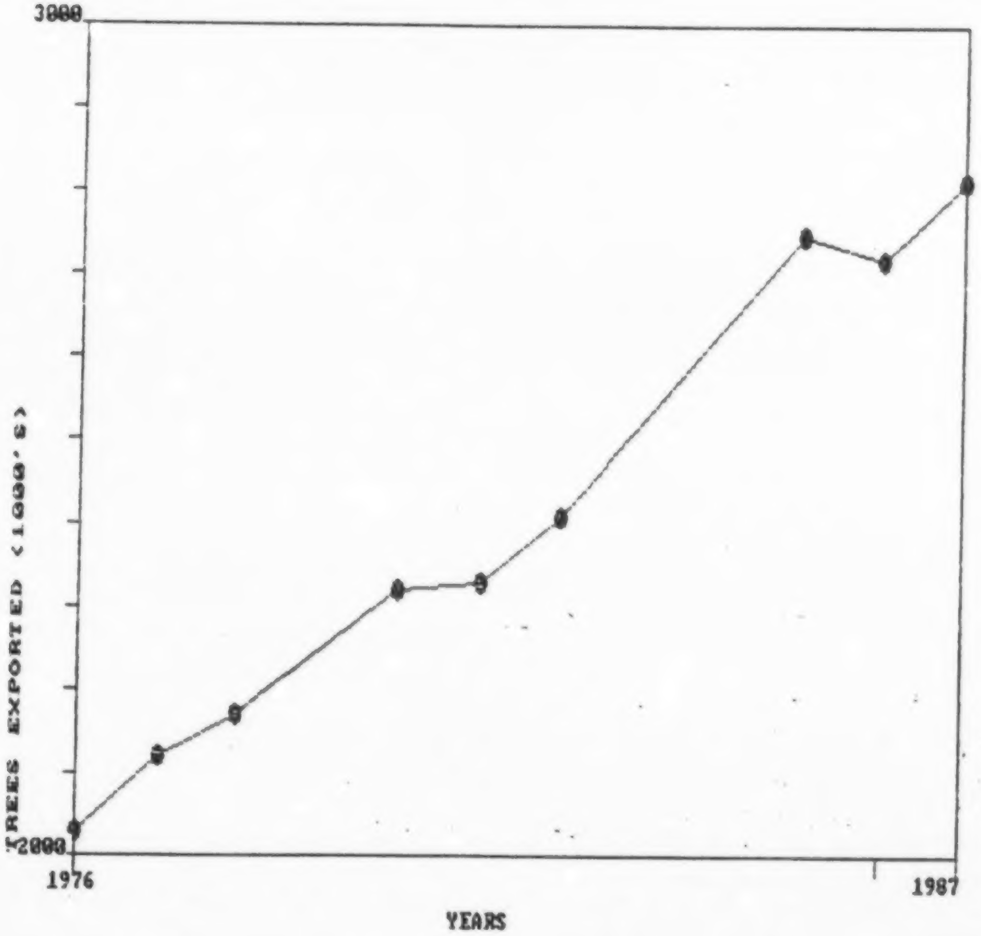


Figure 82. **The Number of Natural Christmas Trees Exported from Canada Over the Past Decade**

B. CANADIAN CHRISTMAS TREE IMPORT ANALYSIS

NATURAL TREE IMPORTS

The sole source of natural tree imports into Canada is the United States. A reliable figure for the actual number of trees imported is virtually impossible to obtain due to only value (in $'s) figures provided by Canadian Custom Authorities to Statistics Canada (see Table 17, page V-10).

In 1987, the value of tree imports increased almost three (3) times the normal, partially due to an American oversupply and a lifting of the 30% tariff against American Christmas trees. It appears that in the past 3 to 5 years, many individuals in the States have begun to enter the Christmas tree market, creating a surplus that has partially been exported to Canada. Figure 83, page V-5, displays the natural tree import trend over the past decade.

Assuming a unit price of $10.00 (exchanges included), the total import value for 1987, of $2,503,000, would represent approximately 250,000 stems.

Future natural tree import trends from the United States into Canada will be very hard to project. With the recent (1987) lifting of the 30% tariff against American trees, there will be a continual increase in imports of these trees as long as they can be purchased by suppliers & retailers at a price less, or at least competitive with, the Canadian Christmas tree.

ARTIFICIAL TREE IMPORTS

Perhaps the import of greatest concern to the SCTGA, should be the artificial Christmas tree, particularly those produced by the Pacific Rim countries. Until 1980, the imports of artificials captured a relatively insignificant portion of the Canadian market. The main suppliers to this point were Hong Kong & Taiwan, exporting in 1982, approximately $489,000 & $270,000 worth of artificial trees, respectively. As shown in Figure 84, page V-6, the value of imports has sky-rocketed since that time. Hong Kong has doubled its exports; Taiwan has quadrupled, and the Peoples Republic of China has entered the market over the past three years with approximately $1,000,000 in annual exports to Canada.

As with any product line produced by the above countries, the imported artificial tree will continue to expand into the market place simply because of improvements in artificial tree quality and its ability to withstand many years of continual usage. Also, artificials offer the consumer a very large price range to satisfy a full spectrum of tastes & financial statuses. As they are relatively new to this business venture, it may be 5 - 10 years before this upward trend levels off & stabilizes.

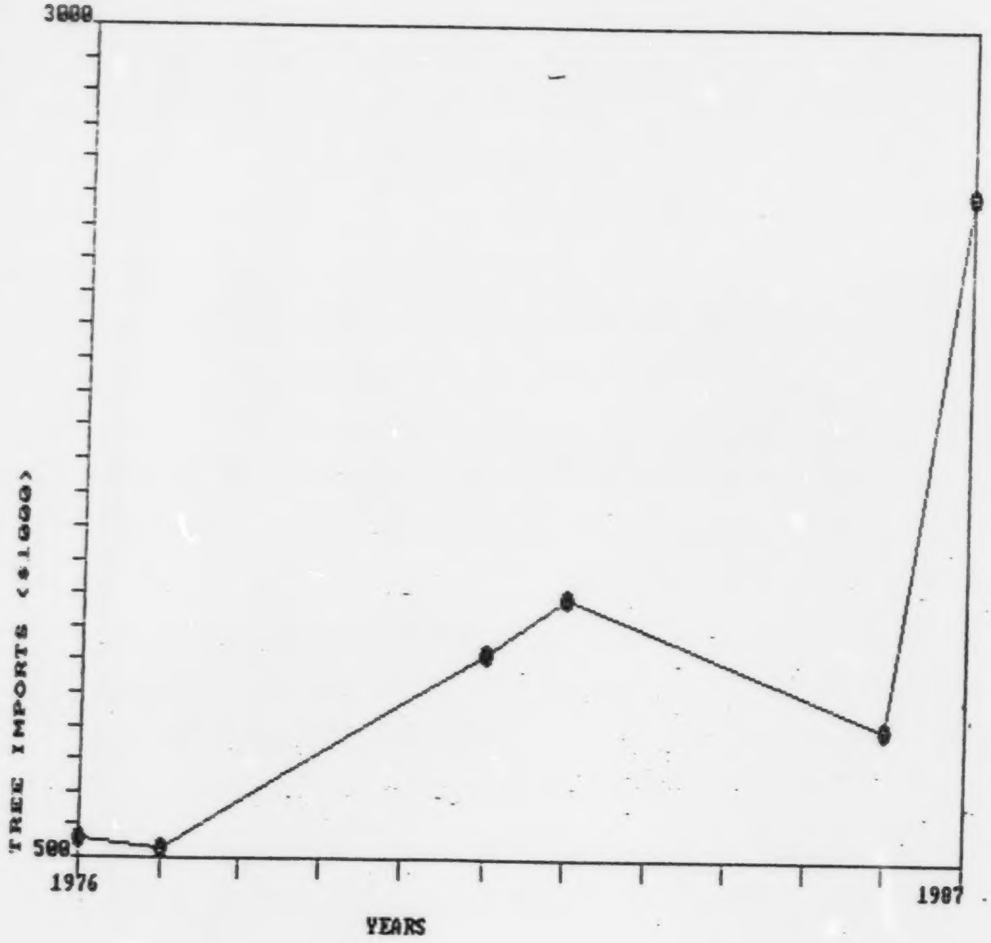


Figure 83. The Value of Natural Tree Imports into Canada Over the Past Decade

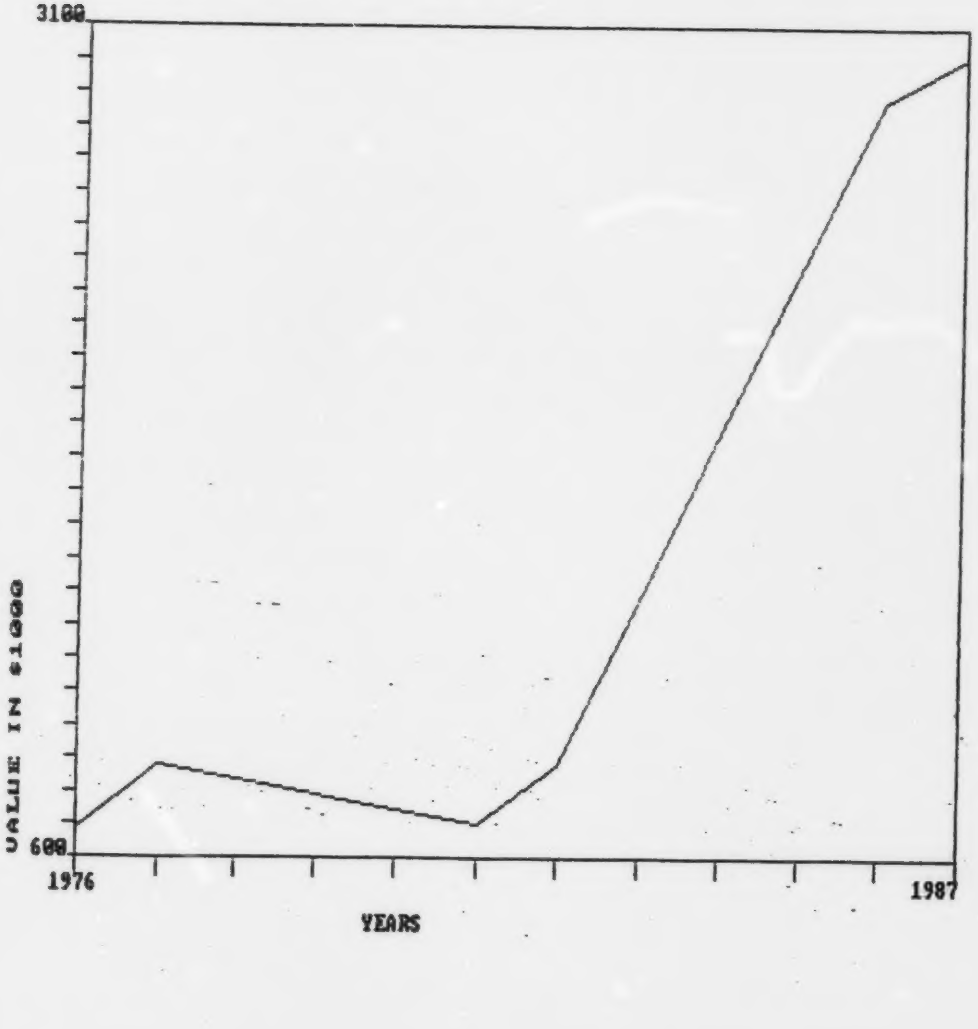


Figure 84. The Value of Artificial Tree Imports into Canada Over the Past Decade

C. SUPPORTIVE EXPORT/IMPORT DATA

This Section contains all relevant Export/Import data obtained from Statistics Canada.

Table 15. NATURAL TREE EXPORTS BY CANADA

value in thousands of dollars — valeur en milliers de dollars

COMMODITY AND COUNTRY	DOMESTIC EXPORTS - EXPORTATIONS NATIONALES Quantity - Quantité 1976	1977	1978	Value - Valeur 1976	1977	1978	RE-EXPORTS - REEXPORTATIONS Quantity - Quantité 1977	1978	Value - Valeur 1977	1978	MARCHANDISE ET PAYS
23909 Christmas trees											Arbres de Noël 23909
	No						Nomb				
United Kingdom	10,470			42							Royaume-Uni
Germany West			1,140			10					Allemagne ouest
Iceland	350	850	700	1	3	2					Islande
Hong Kong		3	18			1					Hong Kong
Venezuela	48,844	99,097	45,511	66	167	78					Venezuela
Bahamas	3,405	5,183	2,088	8	9	4					Iles Bahamas
Bermuda	2,770	2,460	360	4	4	2					Bermudes
Barbados	823	1,020	993	2	2	5					Barbade
Jamaica		8									Jamaique
Leew.-Wind. Is.	1,610	120	100	2		1					I. Leew.-Wind.
Mexico	33,943	75,668	83,007	41	110	105					Mexique
Neth. Antilles	6,148	5,456	800	13	13	5					Antilles néerl.
Panama	7,099	11,323	12,791	11	20	26					Panama
Puerto Rico	2,165	6,052	27,168	4	10	37					Porto Rico
United States	1,910,482	1,914,211	1,996,318	3,529	4,060	5,357					Etats-Unis
. Total	2,028,109	2,121,951	2,170,994	3,724	4,399	5,632					Total

value in thousands of dollars — valeur en milliers de dollars

COMMODITY AND COUNTRY	DOMESTIC EXPORTS - EXPORTATIONS NATIONALES Quantity - Quantité 1980	1981	1982	Value - Valeur 1980	1981	1982	RE-EXPORTS - REEXPORTATIONS Quantity - Quantité 1981	1982	Value - Valeur 1981	1982	MARCHANDISE ET PAYS
23909 Christmas trees											Arbres de noël 23909
	NO						NOMB				
St Pierre-Miq.	155	644	565	1	8	7					St-Pierre-Miq.
United States	2,509,027	2,504,403	2,792,257	20,823	22,682	24,527		3,540		14	États-Unis
United Kingdom	500			6							Royaume-Uni
Belgium-Luxemb		542			19						Belgique-Lux.
Germany West			400			5					Allemagne, o.
Hong Kong	281	13		3	1						Hong-Kong

value in thousands of dollars — valeur en milliers de dollars

Commodity and Country	Domestic Exports - Exportations nationales Quantity - Quantité 1985	1986	1987	Value - Valeur 1985	1986	1987	Re-exports - Réexportations Quantity - Quantité 1986	1987	Value - Valeur 1986	1987	Marchandise et pays
23909 Christmas trees (cont.)											Arbres de noël 23909 (suite)
	NO						NOMB				
Singapore		25									Singapour
Australia		1,518			13						Australie
New Zealand			12,376			29					Nouv. Zélande
Bahamas	2,057	7,335	3,537	21	50	61					Bahamas
Bermuda	11,255	2,200	8,308	120	77	79					Bermudes
Barbados	940	1,750	558	10	13	7					Barbade
Leew-Wind Is.	573	6,272	1,217	4	13	5					Î. Leew-Wind.
Trinidad-Tobago		484	400		14	9					Trinidad-Tobago
Dominican Rep.		820	-		1						R. Dominicaine
Haiti		1,200			6						Haïti
Mexico			930			10					Mexique
Neth. Antilles	5,811	10,389	8,191	51	112	80					Antilles néerl.
Nicaragua	2,147			12							Nicaragua
Panama	7,145	8,338	12,482	33	139	123					Panama
Puerto Rico	105,845	68,000	38,317	375	311	293					Porto Rico
U.S. Virgin Is.	1,818			7							Î. Vierges É.-U.
Total	2,747,335	2,717,131	2,811,934	21,733	23,478	25,234		3,540		14	Total

value in thousands of dollars — valeur en milliers de dollars

Commodity and Country	Domestic Exports - Exportations nationales Quantity - Quantité 1985	1986	1987	Value - Valeur 1985	1986	1987	Re-exports - Réexportations Quantity - Quantité 1986	1987	Value - Valeur 1986	1987	Marchandise et pays
23909 Christmas trees											Arbres de Noël 23909
	No						Nomb				
United Kingdom		900			6						Royaume-Uni
Germany West	1,803	250		3	4						Allemagne ouest
Iceland	2,100	2,543		7	9						Islande
Hong Kong	15	15	16	1	1	1					Hong Kong
Venezuela	38,890	66,657	48,715	83	214	290					Venezuela
Bahamas	3,087	3,714	3,053	11	10	21					Iles Bahamas
Bermuda	2,802	6,822	3,456	36	107	77					Bermudes
Barbados		2,160	764		19	5					Barbade
Mexico	25,655	53,779		39	95						Mexique
Neth. Antilles	5,260	15,882	10,804	29	88	37					Antilles néerl.
Panama	17,706	6,449	4,017	87	46	59					Panama
Puerto Rico	21,104	17,057	12,435	32	87	72					Porto Rico
United States	2,202,802	2,154,412	2,326,298	9,054	10,559	13,704		920		9	Etats-Unis
Total	2,321,224	2,330,640	2,409,558	9,381	11,244	14,265		920		9	Total

Source: STATISTICS CANADA

Table 16. NATURAL TREE DOMESTIC EXPORTS BY SASKATCHEWAN

STATISTICS CANADA
INTERNATIONAL TRADE

DOMESTIC EXPORTS
BY PROVINCE OF ORIGIN BY CLASS AND BY COUNTRY
JANUARY TO DECEMBER, 1987

SASKATCHEWAN

CLASS	UNIT OF QUANTITY	COUNTRY	QUANTITY	VALUE
23909 CHRISTMAS TREES	NO	-009 UNITED STATES	4,991	21,050

Source: STATISTICS CANADA

Table 17. NATURAL TREE IMPORTS FROM WORLD COUNTRIES

COMMODITY AND COUNTRY MARCHANDISE ET PAYS			1976 QUANTITY QUANTITE IMPERIAL IMPERIALE	1976 QUANTITY QUANTITE METRIC METRIQUE	1976 VALUE VALEUR $.000	1977 QUANTITY QUANTITE IMPERIAL IMPERIALE	1977 QUANTITY QUANTITE METRIC METRIQUE	1977 VALUE VALEUR $.000	
23899-30 CHRISTMAS TREES, NATURAL ARBRES DE NOEL NATURELS									23899-30
UNITED STATES	990	ETATS-UNIS	—	—	561	—	—	532	
C.I.T.C. TOTAL		TOTAL N.C.C.I.	—	—	561	—	—	532	

COMMODITY AND COUNTRY MARCHANDISE ET PAYS			1981 QUANTITY QUANTITE IMPERIAL IMPERIALE	1981 QUANTITY QUANTITE METRIC METRIQUE	1981 VALUE VALEUR $.000	1982 QUANTITY QUANTITE IMPERIAL IMPERIALE	1982 QUANTITY QUANTITE METRIC METRIQUE	1982 VALUE VALEUR $.000	
23899-30 CHRISTMAS TREES, NATURAL ARBRES DE NOEL NATURELS									23899-30
UNITED STATES	990	ETATS-UNIS	—	—	1.114	—	—	1.289	
C.I.T.C. TOTAL		TOTAL N.C.C.I.	—	—	1.114	—	—	1.289	

COMMODITY AND COUNTRY MARCHANDISE ET PAYS			1986 QUANTITY QUANTITÉ METRIC MÉTRIQUE	1986 VALUE VALEUR $.000	1987 QUANTITY QUANTITÉ METRIC MÉTRIQUE	1987 VALUE VALEUR $.000
3899-30 Christmas trees, natural Arbres de noël naturels						
United States	5	États-Unis	-	833	-	2.503
C.I.T.C. TOTAL		TOTAL N.C.C.I.	-	833	-	2.503

Source: STATISTICS CANADA

Table 18. ARTIFICIAL TREE IMPORTS FROM WORLD COUNTRIES

COMMODITY AND COUNTRY MARCHANDISE ET PAYS			1976 QUANTITY QUANTITE IMPERIAL IMPERIALE	1976 QUANTITY QUANTITE METRIC METRIQUE	1976 VALUE VALEUR $,000	1977 QUANTITY QUANTITE IMPERIAL IMPERIALE	1977 QUANTITY QUANTITE METRIC METRIQUE	1977 VALUE VALEUR $,000	
94999-51 TREES, CHRISTMAS, ARTIFICIAL ARBRES DE NOEL ARTIFICIELS									94999-51
ITALY	67	ITALIE	—	—	[illegible]	—	—	6	
HONG KONG	516	HONG-KONG	—	—	58	—	—	381	
TAIWAN	578	TAIWAN	—	—	564	—	—	488	
UNITED STATES	990	ETATS-UNIS	—	—	58	—	—	21	
C.I.T.C. TOTAL		TOTAL N.C.C.I.	—	—	685	—	—	882	

COMMODITY AND COUNTRY MARCHANDISE ET PAYS			1981 QUANTITY QUANTITE IMPERIAL IMPERIALE	1981 QUANTITY QUANTITE METRIC METRIQUE	1981 VALUE VALEUR $,000	1982 QUANTITY QUANTITE IMPERIAL IMPERIALE	1982 QUANTITY QUANTITE METRIC METRIQUE	1982 VALUE VALEUR $,000	
94999-51 TREES, CHRISTMAS, ARTIFICIAL ARBRES DE NOEL ARTIFICIELS									94999-51
GERMANY WEST	55	ALLEMAGNE, O.	—	—	3	—	—	26	
HONG KONG	516	HONG-KONG	—	—	340	—	—	489	
JAPAN	559	JAPON	—	—	3	—	—	—	
TAIWAN	578	TAIWAN	—	—	116	—	—	270	
THAILAND	583	THAILANDE	—	—	189	—	—	82	
UNITED STATES	990	ETATS-UNIS	—	—	51	—	—	32	
C.I.T.C. TOTAL		TOTAL N.C.C.I.	—	—	702	—	—	880	

COMMODITY AND COUNTRY MARCHANDISE ET PAYS			1986 QUANTITY QUANTITÉ METRIC MÉTRIQUE	1986 VALUE VALEUR $.000	1987 QUANTITY QUANTITÉ METRIC MÉTRIQUE	1987 VALUE VALEUR $.000
94999-51 Trees, christmas, artificial Arbres de noël artificiels						
United States	9	États-Unis	-	224	-	86
United Kingdom	101	Royaume-Uni	-	-	-	13
Belgium-Luxemb	144	Belgique-Lux.	-	-	-	3
Germany West	155	Allemagne, o.	-	-	-	2
Italy	167	Italie	-	2	-	-
Hong Kong	516	Hong-Kong	-	756	-	853
China, P. Rep.	553	Chine, Rép. pop.	-	533	-	900
Japan	559	Japon	-	3	-	-
Korea, South	564	Corée du sud	-	122	-	-
Philippines	567	Philippines	-	2	-	-
Taiwan	578	Taiwan	-	999	-	1,140
Thailand	583	Thaïlande	-	180	-	-
C.I.T.C. TOTAL		TOTAL N.C.C.I.	-	2.880	-	3.010

Source: STATISTICS CANADA (1987)

APPENDIX VI

GENERAL STUDY SUPPORT STATISTICS

INTRODUCTION

This Appendix contains all relevant background study support statistics to the MAIN & APPENDICES REPORTS.

Sources include STATISTICS CANADA and CANADA MORTGAGE & HOUSING CORPORATION.

A. STATISTICS CANADA CENSUS INFORMATION

Table 19. CANADA-SASKATCHEWAN DWELLING, HOUSEHOLD & CENSUS FAMILY CHARACTERISTICS, 1986

No.	Characteristics	CANADA	Saskatchewan PROVINCE	Division No. 1 CD/DR	Alameda, T	Alida, VL	Antler, VL
	DWELLING CHARACTERISTICS						
1.	Total number of occupied private dwellings......	8,991,670	358,270	12,125	135	70	35
	by tenure						
2.	Owned................................	5,580,880	250,970	9,405	115	65	25
3.	Rented................................	3,368,480	101,540	2,600	20	5	5
4.	On reserve(2)........................	42,310	5,765	125	-	-	-
	by type of dwelling						
5.	Single-detached house........................	5,171,800	275,450	10,065	125	65	30
6.	Apartment, 5 or more storeys................	803,345	9,305	-	-	-	-
7.	Movable dwelling........................	116,430	7,885	580	-	-	-
8.	All other types(3)........................	2,900,100	65,620	1,485	5	-	-
	HOUSEHOLD CHARACTERISTICS						
	Private Households						
9.	Total number of private households..............	8,991,675	358,265	12,125	135	70	30
	by size of household						
10.	1 person........................	1,934,710	83,785	2,835	45	15	10
11.	2 persons........................	2,701,175	108,870	3,750	50	30	10
12.	3 persons........................	1,599,320	58,090	1,830	15	10	5
13.	4 - 5 persons........................	2,409,800	93,065	3,120	25	15	10
14.	6 - 9 persons........................	336,900	15,905	580	5	-	5
15.	10 or more persons........................	9,760	760	5	-	-	-
	by number of families						
16.	Non-family household........................	2,356,675	99,480	3,290	45	20	10
17.	1 census family........................	6,537,880	257,015	8,800	85	55	20
18.	2 or more census families........................	97,120	1,770	40	5	-	-
	Persons in Private Households						
19.	Total........................	24,773,110	984,620	33,215	315	190	90
20.	Average number of persons per household.......	2.8	2.7	2.7	2.3	2.7	2.8
	CENSUS FAMILY CHARACTERISTICS						
	Census families						
21.	Total number of census families in private households........................	6,734,975	260,805	8,875	90	55	25
	by size of family						
22.	2 persons........................	2,690,375	105,260	3,815	50	30	10
23.	3 persons........................	1,536,710	52,845	1,725	10	5	-
24.	4 persons........................	1,644,205	59,860	1,975	15	10	5
25.	5 or more persons........................	863,485	42,625	1,360	10	10	5
	by family structure and presence of children						
26.	Number of husband-wife families................	5,881,335	231,565	8,205	85	45	20
27.	With no children at home................	2,201,550	89,380	3,215	45	20	5
28.	With children at home................	3,679,785	142,180	4,985	35	20	15
29.	1 child at home................	1,280,610	44,610	1,535	10	5	5
30.	2 children at home................	1,564,685	56,660	1,920	15	10	5
31.	3 or more children at home................	834,485	40,900	1,535	5	10	5
32.	Number of lone-parent families................	853,640	29,040	675	5	10	5
33.	Male parent................	151,740	5,215	155	-	-	-
34.	1 child at home................	91,020	2,990	100	-	5	-
35.	2 children at home................	42,135	1,395	35	-	-	-
36.	3 or more children at home................	18,580	830	15	-	-	-
37.	Female parent................	701,900	23,825	520	-	5	-
38.	1 child at home................	398,005	12,885	305	5	5	-
39.	2 children at home................	213,945	6,840	150	-	-	-
40.	3 or more children at home................	89,955	4,100	65	-	5	5

Source: STATISTICS CANADA (1986 CENSUS)

Table 20. SASKATCHEWAN DWELLING, HOUSEHOLD & CENSUS FAMILY CHARACTERISTICS, BY CITY & TOWN, 1986

Source: STATISTICS CANADA (1986 CENSUS)

	ESTEVAN	WEYBURN	MAPLE CREEK	MELVILLE	INDIAN HEAD	REGINA	MOOSE JAW	SWIFT CURRENT
POPULATION	10,161	10,153	2,482	5,123	1,866	175,064	35,073	15,666
TOTAL NO. OCCUPIED PRIVATE DWELLINGS	3,740	3,900	1,030	2,060	770	64,630	12,490	6,175
OWNED	2,325	2,540	810	1,325	595	41,380	8,145	4,020
RENTED	1,370	1,360	220	530	175	22,735	4,345	2,155
SINGLE DET.	2,320	2,745	870	1,600	630	43,935	9,200	4,130
APARTMENT		80				3,410	375	110
MOVEABLE DWEL.	230		40	30		170	260	115
OTHER	1,000	1,070	125	415	125	16,815	3,290	1,845
TOTAL NO. PRIVATE HOUSEHOLDS	3,745	3,900	1,030	2,060	770	64,625	12,490	6,170
AVERAGE PERSON PER HOUSEHOLD	2.7	2.5	2.3	2.4	2.4	2.7	2.5	2.5
TOTAL CENSUS FAMILIES IN PRIVATE HOUSEHOLDS	2,645	2,630	665	1,290	525	45,230	9,290	4,260
AVG. PERSONS PER CENSUS FAMILY	3.2	3.0	2.9	3.0	2.9	3.2	3.0	3.0
TOTAL FAMILY PERSONS > 65 YEARS OF AGE	1,200	970	260	645	270	8,950	3,080	1,490
TOTAL ECONOMIC FAMILIES IN PRIVATE HOUSEHOLDS	2,700	2,600	680	1,485	525	46,280	9,445	4,225
AVG. NO. PERSONS PER ECONOMIC FAMILY	3.2	3.0	2.9	3.0	2.9	3.2	3.0	3.0
NO. UKRAINIANS BY ETHNIC ORIGIN	380	120	30	565	20	7,225	1,130	310
AVG. NO. ROOMS PER DWELLING	6.1	5.9	6.1	5.7	5.9	5.9	5.9	6.1
AVG. VALUE OF HOME	$68,268	$64,419	$57,116	$49,458	$53,072	$72,302	$55,562	$71,997
AVG. FAMILY INCOME	$43,630	$38,994	$31,637	$30,351	$31,272	$41,894	$34,635	$36,725
AVG. HOUSEHOLD INCOME	$38,837	$32,873	$27,099	$25,254	$27,318	$36,372	$29,953	$31,387

	PREECEVILLE	YORKTON	WYNYARD	SASKATOON	WATROUS	BATTLEFORD	N. BATTLEFORD	ROSETOWN
POPULATION	1,272	15,574	2,079	177,641	1,953	3,833	14,876	2,663
TOTAL NO. OCCUPIED PRIVATE DWELLINGS	550	5,895	855	67,075	765	1,240	5,365	1,075
OWNED	465	4,065	680	38,345	590	1,005	3,430	740
RENTED	90	1,830	170	28,725	175	240	2,135	340
SINGLE DET.	490	4,295	720	40,220	625	1,070	3,775	885
APARTMENT				3,925			225	
MOVEABLE DWEL.	20		20	425		45	60	3
OTHER	45	1,300	115	22,400	140	125	1,495	190
TOTAL NO. PRIVATE HOUSEHOLDS	550	5,900	855	67,075	765	1,240	5,365	1,075
AVERAGE PERSON PER HOUSEHOLD	2.2	2.6	2.2	2.6	2.5	2.9	2.6	2.4
TOTAL CENSUS FAMILIES IN PRIVATE HOUSEHOLDS	365	4,120	545	45,625	525	965	3,625	700
AVG. PERSONS PER CENSUS FAMILY	2.8	3.1	2.9	3.1	3.0	3.3	3.1	3.0
TOTAL FAMILY PERSONS > 65 YEARS OF AGE	240	1,305	280	9,050	225	245	1,180	305
TOTAL ECONOMIC FAMILIES IN PRIVATE HOUSEHOLDS	370	4,215	565	47,105	540	980	3,720	715
AVG. NO. PERSONS PER ECONOMIC FAMILY	2.8	3.1	3.0	3.2	3.3	3.3	3.2	3.0
NO. UKRAINIANS BY ETHNIC ORIGIN	430	3,840	65	13,030	80	230	970	35
AVG. NO. ROOMS PER DWELLING	5.7	5.9	5.7	6.0	6.0	6.4	6.1	6.1
AVG. VALUE OF HOME	$39,247	$66,440	$51,601	$78,312	$51,943	$64,861	$65,661	$57,314
AVG. FAMILY INCOME	$24,753	$34,213	$33,052	$38,852	$33,715	$33,374	$36,622	$39,280
AVG. HOUSEHOLD INCOME	$19,946	$28,888	$22,484	$33,604	$30,281	$32,177	$30,996	$32,294

	KINDERSLEY	HUDSON BAY	MELFORT	NIPAWIN	TISDALE	PRINCE ALBERT	LLOYDMINSTER	MEADOW LAKE
POPULATION	4,912	2,133	6,078	4,388	3,184	33,686	7,132	3,976
TOTAL NO. OCCUPIED PRIVATE DWELLINGS	1,800	775	2,330	1,830	1,305	11,880	2,470	1,380
OWNED	1,235	525	1,310	1,300	870	6,725	1,395	885
RENTED	565	250	525	525	485	4,965	1,075	385
SINGLE DET.	1,170	625	1,635	1,470	1,085	8,135	1,435	975
APARTMENT			120		10	665	80	
MOVEABLE DWEL.	315	3	65	60		3	30	60
OTHER	415	140	550	295	230	3,060	705	345
TOTAL NO. PRIVATE HOUSEHOLDS	1,795	775	2,330	1,830	1,300	11,890	2,470	1,390
AVERAGE PERSON PER HOUSEHOLD	2.7	2.7	2.3	2.3	2.4	2.7	2.9	2.8
TOTAL CENSUS FAMILIES IN PRIVATE HOUSEHOLDS	1,300	565	1,375	1,365	870	8,340	1,840	1,000
AVG. PERSONS PER CENSUS FAMILY	3.1	3.3	3.1	3.0	3.0	3.2	3.2	3.3
TOTAL FAMILY PERSONS > 65 YEARS OF AGE	300	145	570	525	270	1,890	305	315
TOTAL ECONOMIC FAMILIES IN PRIVATE HOUSEHOLDS	1,330	570	1,395	1,380	885	8,715	1,890	1,020
AVG. NO. PERSONS PER ECONOMIC FAMILY	3.1	3.3	3.1	3.0	3.0	3.3	3.2	3.4
NO. UKRAINIANS BY ETHNIC ORIGIN	125	295	415	340	130	2,260	160	100
AVG. NO. ROOMS PER DWELLING	6.3	6.5	5.9	5.7	5.7	5.9	5.8	5.8
AVG. VALUE OF HOME	$69,736	$47,199	$61,640	$51,867	$61,349	$63,305	$73,284	$53,254
AVG. FAMILY INCOME	$39,976	$33,243	$33,901	$32,380	$31,826	$34,886	$35,299	$39,268
AVG. HOUSEHOLD INCOME	$38,837	$29,160	$28,323	$27,446	$26,260	$30,229	$32,976	$26,291

Table 21. SASKATCHEWAN AGE DISTRIBUTION & FAMILY INCOME PROFILES, 1986

AGE DISTRIBUTION FOR 1986

AGE CLASS	MALE	FEMALE	TOTAL
0 - 4	43935	41960	85895
5 - 9	42300	40040	82340
10 - 14	39380	38100	77480
15 - 19	40300	38315	78615
20 - 24	44670	44230	88900
25 - 34	86600	83905	170505
35 - 44	60115	58045	118160
45 - 54	44785	44225	89010
55 - 64	44485	45620	90105
65 - 74	35160	40385	75545
75 +	22630	30420	53050
TOTALS	504365	505250	1009605

FAMILY INCOME FOR 1986

INCOME CLASS	FREQUENCY
UNDER 5000	11965
5000 - 9990	13195
10000 - 14999	26845
15000 - 19999	28005
20000 - 24999	24405
25000 - 29999	24030
30000 - 34999	23200
35000 - 39999	21915
40000 - 49999	34575
OVER 50000	52405
AVERAGE INCOME	$ 34,666

Source: STATISTICS CANADA (SASKATCHEWAN PROFILES, 1986)

B. CONSTRUCTION & HOUSING STATISTICS

Table 22. TOTAL VALUE OF CONSTRUCTION WORK PURCHASED - NEW & REPAIR BY TYPE OF STRUCTURE, SASKATCHEWAN, 1985-1988

No	Type of structure	1985			1986		
		New - Neuve	Repair - Réparations	Total	New - Neuve	Repair - Réparations	Total
		$'000					
1	**Total construction**	2,744,448	529,273	3,273,721	2,436,209	523,899	2,960,108
2	**Total building construction**	1,277,922	250,925	1,528,847	1,301,805	261,897	1,563,702
3	**Residential**	691,673	121,400	813,073	692,067	126,400	818,467
4	Single detached	224,072	-	224,072	248,178	-	248,178
5	Semi-detached including duplexes	14,328	-	14,328	11,898	-	11,898
6	Apartments including row housing	74,854	-	74,854	69,372	-	69,372
7	Other(6)	378,419	121,400	499,819	362,619	126,400	489,019
8	**Industrial**	62,195	25,590	87,785	45,593	22,982	68,575
9	Factories, plants, workshops, food canneries, smelters	26,166	9,650	35,816	29,312	10,173	39,485
10	Mine and mine mill buildings	x	x	41,730	15,282	4,149	19,431
11	Railway stations, roadway buildings	x	x	3,624	x	x	X
12	Railway shops, engine houses, water and fuel stations	x	x	6,615	x	x	X
13	**Commercial**	213,087	58,379	271,466	218,202	63,061	281,263
14	Warehouses, storehouses, refrigerated storage, etc.	33,512	4,135	37,647	25,920	4,926	30,846
15	Grain elevators	19,424	9,193	28,617	14,024	8,178	22,202
16	Hotels, clubs, restaurants, cafeterias, tourist cabins	17,957	2,686	20,643	13,891	3,305	17,196
17	Office buildings	71,187	23,392	94,579	91,993	27,119	119,112
18	Stores, retail and wholesale	38,855	11,997	50,852	38,063	12,028	50,091
19	Garages and service stations	13,504	4,061	17,565	9,062	3,524	12,586
20	Theatres, arenas, amusement and recreational buildings	18,648	2,915	21,563	25,249	3,981	29,230
21	Laundries and dry cleaning establishments	-	-	-	-	-	-
22	**Institutional**	203,290	12,967	216,257	260,653	21,718	282,371
23	Schools and other educational buildings	88,989	4,584	93,573	95,799	14,913	110,712
24	Churches and other religious buildings	6,390	527	6,917	5,761	675	6,436
25	Hospitals, sanatoria, clinics, first-aid stations, etc.	59,444	2,186	61,630	87,309	1,836	89,145
26	Other institutional buildings	48,467	5,670	54,137	71,784	4,294	76,078
27	**Other building construction**	107,677	32,589	140,266	85,290	27,736	113,026
28	Farm buildings (excluding dwellings)	63,626	24,361	87,987	60,638	17,738	78,376
29	Broadcasting, radio and television, relay and booster stations, telephone exchanges.	x	2,342	X	x	x	11,984
30	Aircraft hangars	908	470	1,378	x	x	1,748
31	Passenger terminals, bus, boat, air and other	x	179	X	x	x	3,397
32	Armouries, barracks, drill halls, etc.	62	382	444	x	x	1,058
33	Bunkhouses, dormitories, camp cookeries, bush depots and camps.	501	693	1,194	302	386	688
34	Laboratories	8,220	276	8,496	3,362	565	3,927
35	Other building construction	19,955	3,886	23,841	7,549	4,299	11,848

Table 22. (cont.)

1987 New - Neuve	1987 Repair - Réparations	1987 Total	1988 New - Neuve	1988 Repair - Réparations	1988 Total	Genre de construction	No
$'000							
2,782,125	528,266	3,310,391	2,972,595	552,514	3,525,109	**Total des travaux de construction**	1
1,533,183	274,870	1,808,053	1,504,178	288,360	1,792,538	**Total de la construction de bâtiments**	2
922,024	129,600	1,051,624	913,615	133,700	1,047,315	**Habitations**	3
244,999	-	244,999	208,575	-	208,575	Simples détachées	4
11,459	-	11,459	12,124	-	12,124	Semi-détachées et doubles	5
81,965	-	81,965	74,475	-	74,475	Appartements et maisons en rangé	6
583,601	129,600	713,201	618,441	133,700	752,141	Autres(6)	7
61,636	20,838	82,474	42,440	23,066	65,506	**Bâtiments industriels**	8
37,833	9,923	47,756	19,354	11,617	30,971	Fabriques, usines, ateliers, conserveries d'aliments et fonderies.	9
16,179	3,718	19,897	22,608	3,994	26,602	Mines (bâtiments et usines)	10
x	x	X	x	x	X	Chemins de fer (gares et bâtiments de voies)	11
x	x	X	x	x	X	Chemins de fer (ateliers, hangars à locomotives, postes d'eau et de combustible).	12
251,397	69,315	320,712	266,529	75,897	342,426	**Bâtiments commerciaux**	13
21,566	5,827	27,393	24,303	6,163	30,466	Entrepôts, magasins, entrepôts frigorifiques, etc.	14
15,326	6,829	22,155	22,360	8,021	30,381	Silos à grain	15
19,743	2,803	22,546	34,320	3,212	37,532	Hôtels, clubs, restaurants, cafétérias, cabines de touristes	16
121,625	31,353	152,978	116,965	33,403	150,368	Édifices à bureaux	17
31,908	13,803	45,711	32,920	16,257	49,177	Magasins, vente de détail et de gros	18
12,226	4,507	16,733	8,011	4,303	12,314	Garages et stations-service	19
29,003	4,193	33,196	27,650	4,538	32,188	Théâtres, cinémas, stades, établissements récréatifs	20
-	-	-	-	-	-	Blanchisseries et établissements de nettoyage à sec	21
216,600	24,349	240,949	195,121	24,634	219,755	**Édifices institutionnels**	22
60,643	16,827	77,470	61,775	17,479	79,254	Écoles et autres maisons d'enseignement	23
4,412	824	5,236	6,551	613	7,164	Eglises et autres édifices religieux	24
83,833	1,580	85,413	85,286	1,544	86,830	Hôpitaux, sanatoriums, cliniques, postes de premiers soins, etc.	25
67,712	5,118	72,830	41,509	4,998	46,507	Autres édifices institutionnels	26
81,526	30,768	112,294	86,473	31,063	117,536	**Autres bâtiments**	27
56,341	19,231	75,572	57,335	19,680	77,015	Bâtiments de ferme (à l'exception des logements)	28
x	x	12,130	x	x	12,490	Postes de radiodiffusion et de télévision, stations de relais, préamplificateurs d'antenne, centrales téléphoniques.	29
x	x	1,574	x	x	1,199	Hangars pour aéronefs	30
x	x	2,840	x	x	2,195	Gares routières, aérogares, gares maritimes, etc.	31
x	x	1,530	x	x	1,082	Manèges militaires, casernes, salles d'exercice, etc.	32
658	330	988	376	351	727	Maisons de bûcherons, dortoirs, cuisines de chantiers et camps.	33
2,311	826	3,137	1,863	624	2,487	Laboratoires	34
9,300	5,223	14,523	15,092	5,249	20,341	Autres bâtiments	35

Source: STATISTICS CANADA (1986 - 1988)

Table 23. STARTS & COMPLETIONS, BY TYPE OF DWELLING, IN URBAN CENTRES OF 10,000 POPULATIO
& OVER, SUMMARY BY PROVINCE, 1988

Province	Single detached - Simples détachés		Semi-detached - Maisons jumelées		Row - Rangées		Apartment and other - Appartements et autres		Total	
	Oct.	To date - À date	Oct.	To date - À date	Oct.	To date - À date	Oct.	To date - À date	Oct.	To date - À date
	Starts - Mises en chantier									
Canada	9.022	86,313	724	5.473	1,337	12,761	5.013	54.298	16.096	158.845
Newfoundland - Terre-Neuve	179	1.389	-	56	-	15	16	63	195	1,523
Prince Edward Island - Île-du-Prince-Édouard	37	379	11	25	-	15	-	204	48	623
Nova Scotia - Nouvelle-Écosse	197	1,815	56	478	24	205	74	666	351	3,164
New Brunswick - Nouveau-Brunswick	143	1,633	6	66	4	166	18	140	171	2,005
Quebec - Québec	1,587	18,620	202	1,730	73	1,139	1,903	20.303	3,765	41,792
Ontario	4,413	39,567	225	1,820	924	7,620	1,935	23,816	7,497	72,823
Manitoba	224	2,360	6	112	33	254	198	1,257	461	3,983
Saskatchewan	115	1,414	2	96	4	193	42	898	163	2,601
Alberta	633	6,416	122	410	83	363	33	251	871	7,440
British Columbia - Colombie-Britannique	1,494	12,720	94	680	192	2,791	794	6,700	2,574	22,991
	Completions - Achèvements									
Canada	10.459	86,600	661	5,942	1,531	12,933	6,113	52,193	18,764	157,668
Newfoundland - Terre-Neuve	118	1,458	4	16	-	4	2	102	124	1,580
Prince Edward Island - Île-du-Prince-Édouard	67	296	6	48	-	3	32	154	105	501
Nova Scotia - Nouvelle-Écosse	170	1,577	80	499	11	129	147	1,142	408	3,347
New Brunswick - Nouveau-Brunswick	207	1,581	8	100	8	102	4	28	227	1,811
Quebec - Québec	2,178	20,246	210	2,155	152	1,571	2,544	26,331	5,084	50,303
Ontario	5,193	39,943	239	1,934	1,081	8,226	2,466	15,735	8,979	65,838
Manitoba	324	2,535	16	62	4	142	127	921	471	3,660
Saskatchewan	214	1,556	4	160	18	123	-	994	236	2,838
Alberta	684	6,138	14	276	111	479	-	438	809	7,331
British Columbia - Colombie-Britannique	1,304	11,270	80	692	146	2,149	791	6,348	2,321	20,459

	Single detached - Simples détachés	Semi-detached - Maisons jumelées	Row - Rangées	Apartment and other - Appartements et autres	Total
	Under construction - En construction October - 31 - Octobre				
Canada	42,375	2,313	9,194	57,759	112,641
Newfoundland - Terre-Neuve	1,191	50	15	69	1,325
Prince Edward Island - Île-du-Prince-Édouard	189	11	15	100	315
Nova Scotia - Nouvelle-Écosse	953	177	116	927	2,173
New Brunswick - Nouveau-Brunswick	707	36	170	102	1,015
Québec	4,333	633	420	11,922	17,308
Ontario	24,698	1,036	5,806	34,777	66,317
Manitoba	1,209	66	259	2,322	4,356
Saskatchewan	594	70	160	883	1,707
Alberta	2,923	340	220	185	3,668
British Columbia - Colombie-Britannique	6,078	394	2,013	5,972	14,457

Source: STATISTICS CANADA (OCTOBER 1988)

Table 24. SASKATCHEWAN RURAL & URBAN STARTS BY QUARTER, 1985 - 1988

	SINGLES				ALL OTHERS				TOTAL STARTS			
	1985	1986	1987	1988	1985	1986	1987	1988	1985	1986	1987	1988
RURAL STARTS												
1st Q	105	66	35	71	73	167	376	68	178	233	411	139
2nd Q	278	211	184			54	16		278	265	200	
3rd Q	360	238	217		87	8	49		447	246	266	
4th Q	244	247	199		96	23	84		340	270	283	
Total	987	762	635		256	252	525		1,243	1,014	1,160	
URBAN STARTS												
1st Q	245	369	656	284	318	212	323	170	563	581	979	454
2nd Q	475	821	655		691	382	341		1,166	1,203	996	
3rd Q	899	818	588		492	423	382		1,391	1,241	970	
4th Q	608	1,000	461		383	471	329		991	1,471	790	
Total	2,227	3,008	2,360		1,884	1,488	1,375		4,111	4,496	3,735	
TOTAL RURAL AND URBAN STARTS												
1st Q	350	435	691	355	391	379	699	238	741	814	1,390	593
2nd Q	753	1,032	839		691	436	357		1,444	1,468	1,196	
3rd Q	1,259	1,056	805		579	431	431		1,838	1,487	1,236	
4th Q	852	1,247	660		479	494	413		1,331	1,741	1,073	
Grand Total	3,214	3,770	2,995		2,140	1,740	1,900		5,354	5,510	4,895	

SOURCE: CMHC
NOTE: Urban areas are centres with populations in excess of 10, 000 (based on Statistics Canada's 1986 Census)

Source: CANADA MORTAGE & HOUSING CORPORATION (1988)

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